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2.13 Responding to Calls By Type

Gender: When referring to the Client, she/herself was used throughout Volume 4, SSM for simplicity. However, both genders, male and female, may receive benefits.

2.13.1 Screening

2.13.1.1 Can you tell me if I might be eligible for benefits without having to complete an entire application?

Actions	Script
► After attempting to authenticate caller and identifying what, if any, benefits are currently being received, navigate to Process Request for Services in WFMS, Let's Get Started screen; ask and enter caller's responses to the screening questions. ► Note: if a birth date for a household member is not known, enter 0101 for the month/day/ and for the year, ask the caller to estimate the year and enter that. Inform the caller that if an application is submitted, this information will need to be corrected on the application and provided to us. ► If caller is unable/unwilling to respond to questions where a response is not required, continue through remaining questions to the Results screen. ► Explain screening results and application options to caller. ► Then ask if the caller wants to apply. ► Refer to Application Processing for application options (Section 2.13.2, Application Processing <insert hyperlink>) or Processing an Application work instructions (Section 3.5, Processing an Application WI, Part I and Part II <insert hyperlink>). ► At conclusion of call, document in Call Notes.	**a**. By answering a few short questions, you can learn if you are potentially eligible for TANF, Food Stamps, or Health Coverage before you decide to apply. You can complete these screening questions now, during this call, or on the internet, whichever you prefer. The information you provide is confidential and after completing these questions, you can decide if you want to apply. Regardless of the results of the screening, you can still submit an application which is the way to actually determine whether you are eligible. (If caller decides to screen over the internet): The website for the screening questions is www.in.gov/fssa and click Apply for Benefits. (If caller asks what kinds of questions have to be answered): The questions focus on the people in the home, any income received from a job and/or other sources, rent and utility costs, resources available to the household members, and other information that may relate to the person(s) who is screening for potential eligibility and may be applying for assistance. (Caller decides to screen during call: proceed to complete screening tool.) Let's get started. **b**. (After screening) Would you like to submit an application?

2.13.1.2 Do I have to do a screening to apply?

Actions	Script
► Provide information to caller.	No. Answering the screening questions is not required, though it may help you to know what programs you might be potentially eligible for before you apply.

2.13.1.3 The screening showed I'm not eligible. Can I still apply?

Actions	Script
► Provide information to caller and wait for caller's decision. ► If caller decides to apply on-line, provide web address. ► If caller wants to go to a FSSA/DFR office/Help Center, navigate to the office locator, ask county where the caller is located, and provide the nearest office location.	Yes. The way to find out if you are actually eligible is to submit an application to be processed. I can mail you an application with the information you provided during the screening already filled in. You can review it, update anything on the form, sign it and mail or fax it back so that processing can begin. Or you can apply on-line or download and print and application if you have internet access. You can also go to a Help Center, a local FSSA/DFR office, to apply. I can provide you with the address of the Help Center serving your area.

2.13.2 Application Processing

2.13.2.1 How do I apply for benefits?

Actions	Script
► Ask what program(s) caller is interested in applying for, provide information to caller and wait for caller's decision. ► If caller wants to apply on-line, provide web address. ► If caller wants to apply at a FSSA/DFR office/ Help Center, navigate to the office locator (or use the list in 4.10.1 Scheduling Instructions and Rules Table <insert hyperlink>) and provide nearest office location and hours. ► If caller wants an application mailed, navigate to perform screening or to mail an application without screening.	You can apply in several different ways. ✓ If you have access to the internet, you can complete an application on-line and at the end, print, sign and mail or fax the signature page to us. ✓ You can download and print an application from the internet. ✓ You can complete a paper application, which we can mail to you (with instructions) and return it by mail or fax or at any FSSA/DFR office, also known as a Help Center, during their business hours, or ✓ You can come into one of our Help Centers and we can help you complete an application at that time. If you are applying for Food Stamps, benefits are determined based on the date your application is received with at least your signature, name, address, and a program checked. You can apply at a FSSA/DFR office or Help Center today (or the next business day if call is received after Help Center business hours). Once your application is submitted, we will send you a letter to notify you of required interviews, the date and time of the interview, whether it is over the telephone or in a FSSA/DFR office / Help Center, additional information required to complete processing the application, and when the information is due.

2.13.2.2 What are verification documents?

Actions	Script
► Follow script. ► If caller is seeking more information related to a pending notice that the caller received, authenticate caller. ► Navigate to the pending notice and provide an explanation. Otherwise, only general information may be provided.	Verification documents are copies of documents that are proof of the information on your application form. Some examples are: copies of pay stubs to prove the amount of earned income; utility bills for shelter costs; proof of prescriptions you paid for medical expenses; lease agreements for rent; or county clerk records for child support received. When we mail you an application, we will also send a list of verification documents that can be submitted as proof. After we receive your

Actions	Script
	application and begin processing it, if we need any additional verification documents, we will send you a notice listing any other documents required.

2.13.2.3 How long does it take to get (TANF, FS, Medicaid) benefits if I am eligible? (Or) How long does it take to process an application?

Action	Script
► Provide information for the program(s) the caller is calling about.	There are standard time frames for processing applications. It is important for you to turn in all verifications as quickly as possible so that you receive your benefits within those time frames. If you apply for: ✓ Cash Assistance, a decision is made 45 days after a signed application is received for processing. ✓ Food Stamps, a decision is made 30 days after a signed application is received for processing. However, each application is reviewed to see if the applicant qualifies for faster processing and if so, a decision is made within 7 days of receiving a signed application. If you don't qualify for faster processing, we'll notify you through the mail of the scheduled interview to determine your eligibility, and at the interview, you will be notified of any additional proof or information which we may require. ✓ Hoosier Healthwise, Family Medicaid, and Medicaid for the Aged and Blind, a decision is made in 45 days. ✓ Medicaid for the Disabled, the time frame is 90 days.

2.13.2.4 Can you send me an application?

Action	Script
► Follow Screening Script to offer to screen caller first. (Section 2.13.1, Screening <insert hyperlink>) If caller prefers not to screen, an application packet can be mailed	Follow action steps.

Action	Script
out by navigating to the Apply Now link in the User Home page and entering the caller's name and address to mail.	

2.13.2.5 What information do I need to give you to apply?

Action	Script
► Provide script information.	The application needs to include at least your name, address, signature and program(s) you want to apply for. Please understand that although you can submit a partially completed application, it will speed up the processing of the application if you complete as much of the application form as you are able to prior to sending it to us. Also the application packet we send to you includes instructions in a section called "Information to Get You Started." Review that for additional information on what copies of documents you need to send us as proof and where to mail or fax those documents, with the document cover sheet that is included in the packet. We will contact you by telephone or mail if we need additional documentation or information to complete processing your application.

2.13.2.6 What do I do if I can't get the information you've asked me for?

Actions	Scripts
► If the caller is asking a general question and has not yet applied, provide a general response. ► If the caller has applied, **transfer the call to a Tier 2 ES**. ► If the caller has submitted an application, authenticate the caller. Then navigate to the Solicited Documents Requests page. View the requested information that has not been received. ► Based on caller's response, explore	Depending on the type of information needed, we will discuss how we might be able to help get the information. What information are you having difficulty getting?

Actions	Scripts
other ways/sources caller can provide the requested information/verification. ► If none of those are available to the caller, determine if a third party can provide the requested information/verification. ► Offer to assist caller to obtain the requested information/verification. If a third party needs to be contacted, the system allows three way calling, one option for use. If that is not possible, follow policy regarding obtaining a Client's signed release of information. ► If policy permits and other options are not successful in obtaining required information, document the Client's statement as the only available source of information. ► In the Solicited Documents Requests screen, mark that item as Received with the date of the call entered as the receipt date. Document in ICES that this verification was satisfied through Client statement and enter the information provided in the appropriate ICES screens. ► If the Client statement satisfies the last verification needed, the Data Collection Checklist is completed, sending a State Review and Eligibility Determination task to the SEC queue. ► If the last verification is not satisfied, inform Client of remaining verifications needed and due date for receipt.	

2.13.2.7 What if I need help applying? (Or) I need help to apply.

Actions	Scripts
► Determine what type of assistance caller needs.	I can assist you with any questions you may have about the application. Do you have the application

Actions	Scripts
► If the caller has the application form and is having difficulty understanding how to complete a specific portion of the application or terminology used, provide an explanation. ► If that is not successful in assisting the Client, offer to provide the address of the nearest Help Center so that the caller can obtain further assistance.	in front of you? What questions do you have? You may also go into your local FSSA/DFR office (also called Help Center) and ask for assistance completing the application.

2.13.2.8 After I submit an application what happens next?

Actions	Scripts
► Follow the script. ► If the caller is actually seeking status information on an application already submitted, authenticate the caller, view and provide status information from the Case Home page and pending verification checklist.	When we get your signed application, we'll begin processing it. How long it takes us to process your application depends in part on how quickly you return requested information. We'll review the information you provide on the application and any additional documents you send as verification. We'll notify you through the mail of the scheduling details for any interview required to determine your eligibility. You'll also be notified if we need more information. (If applying for TANF add the following): We'll also notify you of any additional actions you must take, such as participating in job search and job orientation activities. When we have finished processing your application, you will receive a notice in the mail letting you know which programs you qualify for, and if applying for Food Stamps or TANF, the amount you will receive in benefits. If you do not qualify for a program the letter will tell you why. You may also call us to check on the status of your application using our automated system.

2.13.2.9 Where can I mail or fax an application/other information you have asked for?

Actions	Scripts
► Follow script.	You can return your completed application and

<table>
<tr><th>Actions</th><th>Scripts</th></tr>
<tr><td>► Navigate to Office Locator in OPS if caller wants nearest office location, enter caller’s county, and provide the address.</td><td>copies of any other documents to us by:
✓ Mailing them to the FSSA Document Center, PO Box 1810, Marion, IN 46952, or
✓ Faxing them to us at 1-800-403-0864, or
✓ Dropping them off at a local FSSA/DFR office, now referred to as a Help Center. I can give you the address of the nearest local office to you if you prefer not to mail or fax the information.
Be sure to use the document cover sheet with any information you send us or drop off at a local Help Center, and write your name and SSN or Case Number, if you have one, on each of the documents.</td></tr>
</table>

2.13.2.10 If I am eligible how do I get my benefits?

<table>
<tr><th>Actions</th><th>Scripts</th></tr>
<tr><td>► Determine what caller is interested in applying for and provide general information from the script.
► If the caller has applied and is authenticated:
✓ View the Case Home page to determine what program(s) the person has applied for.
✓ If approved for benefits, determine approval date so that you can assess whether the card is in the mail.
✓ Provide the response for those programs.
✓ If caller has been approved for Medicaid but lost their previous card, order another card.
1. Request Client’s RID or SSN.
2. On ICES screen, enter “BIMD” in TRANS and the RID or SSN in PARMS.
3. Press Enter.
4. Verify the information on the BIMD screen is correct.</td><td>Food Stamps and/or Cash Assistance
Households who apply for and are eligible for food stamps or cash assistance receive a plastic EBT card, also called a Hoosier Works card, to access their benefits electronically. It works like a debit card, with a specific benefit amount authorized each month. Benefits are secure because the card only works with a four digit Personal Identification Number selected by the participant.
If you receive food stamps, you can access your benefits at any store, supermarket or co-op approved by the U.S. Department of Agriculture to accept the Hoosier Works card. You may want to contact the store nearest you to be sure before you go shopping. If you receive TANF cash assistance, you can access your benefits at authorized retailers and banks.
If you don't currently have a Hoosier Works card, one will be mailed to you within three to five days after the approval of your benefits. You'll also receive instructions on how to activate the card. If you had a card from a previous certification and lost it, you'll need to request another card by calling the EBT Customer Service Automated Response Unit at 1-877-768-5098.
For other questions about how to use the Hoosier</td></tr>
</table>

Actions	Scripts
5. Enter the correct reason code for loss of card "801" lost card "802" card was stolen "803" card destroyed "804" card never received 6. Enter a "Y" where asked if this is the card you wish to replace. 7. Press **Enter**. Card replacement request will be processed.	Works card or anything else related to the card you may contact 1-877-768-5098. **Medicaid (Health Coverage)** For Medicaid services, approved households use a Hoosier Health Card or eligibility approval letter when receiving Health Coverage services. If you've already paid for medical bills during the months for which you have approved Health Coverage, be sure to take your card to your providers so they can bill Medicaid. If you don't already have a card, we'll mail you one within two to three weeks after the approval of your benefits. If you previously received Health Coverage in Indiana, you'll need to use your old card. If you no longer have that card and your Medicaid has been approved, we can order one for you.

2.13.2.11 How do you use the information I give you on my application?

Actions	Scripts
► Provide script information.	We will only use your personal information to determine eligibility for the benefits you request, and we will match your information against federal, state, and local records to make sure the information you provide is correct.

2.13.2.12 Can somebody else apply for me?

Actions	Scripts
► Provide script information.	Yes. For Food Stamps, Cash Assistance, and Health Coverage, you may ask someone to apply for you. We call that person an "Authorized Representative." If you wish to authorize someone to apply for you, sign your application and complete the Authorized Representative section of the application (Section D). Be sure to include verification from you that you want that person to apply for you. This verification, or proof, could be: ✓ A signed statement from you. ✓ A copy of any legal document allowing them to apply for you.

2.13.2.13 Can I apply for someone else?

Actions	Scripts
► Provide script information.	Yes. For Food Stamps, Cash Assistance, and Health Coverage, the other person can designate you as “Authorized Representative” to apply for her. If someone wishes to authorize you to apply, they need to sign the application and complete the Authorized Representative section of the application (Section D). They also need to include verification that they want you to apply on their behalf. This verification, or proof, could be: ✓ A signed statement from the person wants you to apply for her ✓ A copy of any legal document allowing you to apply for the other person.

2.13.2.14 Where is the closest local office to me?

Actions	Scripts
► Navigate to the office locator in OPS, enter caller’s county, and provide office address.	I can provide that information to you. What is your county?

2.13.2.15 The application asks if I want to use the standard utility allowance. What does that mean?

Actions	Scripts
► Provide script information.	The Standard Utility Allowance is a deduction we use when determining the amount of Food Stamps you may be eligible for. If you pay to heat and/or cool your home separate from your rent, then you may be eligible to use the deduction. This deduction will reduce the income counted to determine your eligibility and benefit amount if you are eligible.

2.13.2.16 What do I need to bring to my interview?

Actions	Scripts
► Provide script information if caller is seeking general information. ► If caller is authenticated and asking about her case, navigate to the pending verification checklist in WFMS, review and discuss any specific information requested that has not yet been received. ► Also review the appointment date, time, type and location, in case the Client has actually been scheduled for a telephone interview. ► Remind the Client of the appointment date, time, type and location (if face-to-face).	You will receive (or received) a list of items with your appointment letter to have available for your interview. Copies of those items can also be mailed or faxed to our Document Center at the address/fax number shown on the document cover sheet that came with your application. You may also drop off these documents at a local Help Center/FSSA/DFR office. In general, examples of things Clients are asked to provide are: ✓ proof of any income you receive; ✓ social security numbers for family members; ✓ proof you are a US citizen or if you are not a citizen your immigration status; ✓ proof of state residency such as a utility bill, lease agreement, or a state issued photo ID. Even if you do not have all of the items listed, be sure to keep your appointment. You will be allowed additional time after the appointment to provide required information and verifications.

2.13.2.17 Can I have an interview in person instead of over the phone?

Actions	Scripts
► If caller has not submitted an application, provide general response script. ► If caller has already submitted the application and is authenticated, navigate to ICES to modify interview from telephone to in-person. Identify office location closest to caller and reschedule (Refer to Section 4.10, Scheduling Instructions and Rules Table <insert hyperlink>). Provide date, time and location to the caller. (Notice not sent by ICES if appointment is in less than 7 business days. If appointment is	Yes. You can have an in-person interview if you would like to. (If caller has not submitted an application yet): Make sure you complete that portion of the application (page 2) that indicates you want to be seen in the office. If you do not want to come into the office or you have a hardship that makes it difficult for you to come in for an interview, we can do your interview by phone.

Actions	Scripts
during that time, Send Notice of appointment thru WFMS. (Refer to Section 3.11.4, Sending Notices WI <insert hyperlink>) Document in ICES Case Notes that appointment was rescheduled at caller's request.	

2.13.2.18 You sent me the application to sign and some of the information on the form is wrong (or has changed). What should I do?

Actions	Scripts
► Provide general response script. ► After authenticating the Client, ask what information on the application is wrong and document the correction your Call Note.	Please mark through any information that is incorrect or has changed and write the correct information next to it, trying to write it in a nearby blank space rather than writing over other printed information on the form. If there is not enough room (such as the household has more than 4 members and space on the application is sufficient for only 4 members' information), write the correct information on a separate sheet of paper along with your name and SSN, write the Section Number that the information is for, and send it in with your signed application. It is important that you review the information and update it so that the signed application you send us is correct.

2.13.2.19 How long do I have to wait for an appointment? I already sent in my application.

Actions	Scripts
If caller has been authenticated: ► View documents associated with the case through the Case Home page displayed. If caller has not been authenticated, perform a Person Search to locate any information received, (Refer to Section 3.11.3, Search WI <insert hyperlink>). Also check any case notes in the WFMS. ► If there is no application on record for the Client, ask the Client when	Let me look at our records to see whether we have received your application. When did you mail the application? Follow action steps.

Actions	Scripts
she sent the application. If it was sent within the past few business days, explain that the application may still be in the mail to us. If sent longer ago, explain it has not been received yet. Ask if she would like to wait a few more days, or would like a new application sent to her, or would like information on how to apply on-line at www.in.gov/fssa and click Apply for Benefits. ► If the application has been received, check the Next Appointment section of the Case Details for Call Center page (initial screen presented to Call Center agent when a call is received) in WFMS to find out if an appointment has been scheduled, and the provide caller with date, time, type and location of the appointment. ► Check Client Notice History Screen (CNHS) in ICES to determine when an appointment notice was mailed, and confirm the address shown in the system is the caller's correct address. If incorrect, document correct address in Call Notes; call will need to be transferred to Tier 2 ES to process the address change. ► If the application has already been denied, **escalate call to PRT** (Problem Resolution Team) to check the WFMS and/or ICES case notes to find out why the application was denied. Check ICES to see if a notice has been sent to the individual. ► If an appointment has not been scheduled yet, but the application has been received for processing, let the individual know that she will receive an appointment notice in the mail. ► Update WFMS case notes with the caller's inquiry and information.	

2.13.2.20 I need proof I am no longer employed but my ex-boss won't give it to me. What can I do?

Actions	Scripts
► **Transfer to Tier 2 ES** ► Authenticate caller and review case information. ► If the caller already reported this change in income and solicited documents were requested, ask the caller if she would like to request an extension to turn the documentation in. ► If the caller wants an extension, create a work task for WG 3 that an individual is requesting an extension on the due date of solicited documents. ► If the caller does not want an extension but would like help getting the information, inform Client of the following options: 1. You can attempt a three way call with the Client and the employer. 2. If the Client provides a signed release, we can request the verification from the employer. If the Client agrees to this option, create a Reported Change task for HIP WG 3 requesting that they check to see if needed verification is available through the WORK Number and, if not, send a signed release (if/when Client provides it) and employment verification form to the former employer. 3. Ask Client to send in or fax a personal statement of termination which includes the last date worked, the reason for termination, and when the last paycheck was received. Inform Client statement can also be taken in to a Help Center/	Follow action steps.

Actions	Scripts
FSSA/DFR office. Explain that Client must provide name and Case Number or SSN on any documents submitted and that if Client has a bar-coded cover sheet, include it with any documents submitted to the FSSA Document Center. If you send a task to WG 3, update the ICES case notes regarding the task and the request.	

2.13.2.21 I have my pay garnished. Why do you still count my gross income?

Actions	Scripts
► **Transfer to PRT (Problem Resolution Team)**	When we determine what benefits you are eligible for, we use your gross income, which is your income before taxes or garnishments are taken out. If your garnishment is for child support that is taken out of your check, we can include the child support payments you are court ordered to pay as an expense when determining your eligibility for Food Stamps. You must provide us a copy of the court order that requires you to pay child support, and states the amount, and frequency of the payments. You can send that to our FSSA Document Center at P.O. Box 1810, Marion, IN 46952, by fax at 1-800-403-0864, or by dropping it off at your local Help Center or FSSA/DFR office at <give address>. Be sure your name and Case Number or SSN are written on the document, and if you have a bar-coded Document Cover Sheet, send it with the copy of the court order.

2.13.2.22 My grandchild/niece/nephew is living with me. Can I apply for benefits for him/her? Will my income and/or resources count towards his/her benefits?

Action	Scripts
Follow script. If caller chooses to screen for Medicaid and/or TANF, do not add the specified relative's income and/or resources to determine potential eligibility.	You may apply for Medicaid and/or TANF for the child in your care and you don't have to use your income or resources to determine the child's potential eligibility. If you choose to apply for Food Stamps you will need to provide proof of all income, resources, and shelter costs in your household for all household members. If you apply for Medicaid and/or TANF, you'll need to provide proof the child is in your care and proof of relationship. (For example if you are the grandparent you will need a copy of your birth certificate, your grandchild's birth certificate, and the birth certificate of the child's parent to show proof of relation.)

2.13.2.23 I tried to apply on your web site but am having trouble. Can you help me?

Actions	Scripts
► Attempt to determine what type of trouble the caller is having. ► If it is a problem navigating through the screens, attempt to assist. ► If the caller reports the web site is not functioning (such as screener is not working), navigate to it and attempt to confirm. If problem is confirmed, explain to the caller than you will report the problem and ask the caller to try again later in the day. After ending the call, report the problem by going to the Netfor website to register your ticket. Fill in the prompts, clearly document the problem reported, and submit the support request.. ► If it is a problem with connectivity or their internet provider, suggest they try again later.	Follow action steps.

2.13.2.24 I need to apply for (or need information on) Disaster Food Stamps.

Actions	Scripts
► Provide script response. .	If you are calling because you and/or your family were affected by the recent flooding in the FEMA disaster declared counties of Carroll, Cass or White and wish to apply for disaster food stamp benefits, please go to the Division of Family Resources office in your county of residence. ✓ Carroll County: the address is 6931 W 300 North, Suite B in Delphi, ✓ Cass County: the address is 300 East Broadway in Logansport ✓ White County: the address is 816 Fisher Street in Monticello. Please remember that in order to apply for food stamp disaster benefits, you had to have been directly affected by the flooding which resulted in your home or belongings being damaged or destroyed or you have lost food, income or money as a result of the flooding. Also, the Disaster Food Stamp program is for persons not already receiving Food Stamps.

2.13.3 Application/Case Status

2.13.3.1 I applied for benefits and haven't heard anything. Did you get my application? Has my case been approved? (Or) What is the status of my case?

Actions	Script
► After authenticating caller, check Case Home page in WFMS to determine if the case and AGs shown are open, pending or denied. ► If application has not been received, explore with the caller when and how application was submitted to determine whether it may still be pending delivery by the	Follow action steps.

Actions	Script
US Postal Service. ► If the application is PENDING, tell the caller: ✓ the information requested in the pending notice; ✓ the due date; ✓ the time standard for processing applications for which she applied; and ✓ that she will receive a written notice telling her if her application is approved or denied. ► If the due date is past for pending information and the caller states she needs more time or is not able to get the information, document WFMS case notes and create a work task for WG 2 indicating the caller has requested an extension. ► Confirm the caller's mailing address and phone number. If the address and phone number need updating, use on-line change report (refer to 4.22 Processing a Call to Report a Change <insert hyperlink>) to correct the address or make the phone number change during the call. ► If the application has been APPROVED: ✓ provide the caller with the date of the approval notice; ✓ the type and amount of benefits approved; ✓ confirm the caller's mailing address and phone number; and ✓ if the address and phone number need to be updated, use the on-line change report (refer to 4.22 Processing a Call to Report a Change <insert hyperlink>) to correct the address or make the phone number change during the call. ✓ If the application has been DENIED:	

Actions	Script
✓ provide the caller with the date of the denial notice; ✓ provide the caller with the reason for the denial (listed on the notice); ✓ inform caller of the right to appeal an eligibility decision; ✓ provide information on how she may reapply for benefits. If you are unable to provide sufficient case status information to respond to the caller, transfer the call to PRT. Before making the transfer, you should ask the caller these clarifying questions and document responses in CLRC. 1. What benefits are they calling about? (TANF, Food Stamps, Medicaid, Medicaid Disability, Hoosier HealthWise, Nursing Home, HIP, etc) 2. Is the question about an application or a recertification of a current case? 3. Has the caller returned documents or verifications? If so, when were they sent? 4. Were the documents sent via fax or mail or dropped off at a local Help Center / FSSA/DFR office and was a document cover sheet included? (determine if the caller knows what fax number the documents were sent to) When you are ready to transfer the caller to PRT, inform her that you have documented the case information and will now transfer her to an Eligibility Specialist who review the notes and assist further with her questions.	

2.13.3.2 Did you get the information I sent/faxed to you?

<table>
<tr><th>Action</th><th>Script</th></tr>
<tr><td>

► After authenticating caller, navigate to Documents from Case Home page in WFMS and review the document list.
Ask the caller:

✓ what was sent;
✓ whether it was mailed or faxed;
✓ when it was sent;
✓ if the information included a bar-coded document cover sheet that we provided.

► If the document was just sent, it may not have been received yet or it may be in the process of being scanned at the Document Center.
► If the document did not include a cover sheet, it may be in the non-indexed document queue waiting to be indexed to the case.
► If the document is not shown on the documents list in the case, click Home in WFMS and navigate to your User Home page. Perform a Search Document in case the document could not be indexed to the case.
► If you are unable to find the documents and they were mailed/faxed in enough time to have been received and processed, explain that the caller can resubmit copies of the documents again via mail or fax.
► Make sure the caller has the correct mailing address/fax number, or can drop copies off at a local FSSA/DFR office/Help Center.
► Remind caller to use the bar-coded document cover sheet and write their name and Case Number or

</td><td>
Let me check.
What information did you send?
Was it mailed or faxed to us?
When did you send it?
Did the information include a bar-coded document cover sheet that we provided to you?
a. (Documents found)
Yes we received these documents on (provide date received as shown in Documents List).
b. (Documents not found)
I’m sorry but I cannot find those documents in our system. There are several possible reasons why.
If you just mailed or faxed them, they may not have been processed yet. You may want to call back in several days.
If the bar-coded document cover sheet wasn’t included or the document didn’t have your name and SSN or Case Number, we may not have had enough information to know those documents were for your case.
You may want to resubmit copies of these documents again by mail or fax to us at:
FSSA Document Center
P.O. Box 1810
Marion, IN 46952
Or fax to us at 1-800-403-0864
Or you can take copies of the documents to the nearest FSSA/DFR office, also called Help Center, and I can give you that address if you need it.
Be sure you include a bar-coded document cover sheet if you have it, and whether or not you include it, write your name and Case Number or SSN on every document.
</td></tr>
</table>

Action	Script
SSN on each document copy.	

2.13.3.3 How much will I receive in Food Stamps/TANF?

Action	Script
► After authenticating caller, view the AG status from the Case Home page. Click the hyperlink for each AG to identify the benefit amount (or in ICES, go to AEWAA and view all AGs, status, and benefit amounts.)	Follow action steps.

2.13.3.4 I applied on the Internet. Did you get my application yet, and am I approved?

Action	Script
► After authenticating caller, determine when the application was submitted on-line. ► If the Case Home page is displayed, review when the application was received and the case status. ► Review Documents list from left Navigation bar to determine if Client signed and returned signature page. If not, inform caller this is required before the application can be processed. ► If signature page was returned, review case notes and pending verification checklist to determine application processing status.	Let me check. When did you submit the Internet application? Follow action steps.

2.13.3.5 I moved and didn't get a letter to tell me if I am eligible or not.

Action	Script
► **Transfer to Tier 2 ES** ► After authenticating caller, view the address shown in WFMS and ask	Follow action steps.

Action	Script
caller for the current address. ► If the addresses do not match, take and process the change. The Tier 2 ES will also provide case status information. ► If the addresses match, check Case Status and AG status as shown on the Case Home page. If an eligibility decision has been made on the case, the notice will be shown in the ICES correspondence history and can be resent. ► To access ICES screen for information, put 'CNHS' in Trans and Case Number in PARMS; press **Enter**. Notices sent by system will display by date sent. To view specific notice, complete selection number field and press **F15**. System will show notices; select **F23** for duplicate notice to be mailed. ► Check Case Status and Assistance Group Status and provide to caller. ► If the case is **OPEN**, tell the caller the AG type and amount of benefits. ► If the case is **CLOSED**, provide caller with: ✓ the date of the closure notice; ✓ the reason for the closure; ✓ information on how she may reapply for benefits. ► If the case is **PENDING**, access the most recent pending notice and view the documents list to identify the documents that have not been received and explain to the caller: ✓ The documents requested that have not yet been received, ✓ The due date, ✓ The time standard for processing applications, ✓ If the due date has past for pending information and the caller states she needs more	

Action	Script
time or is not able to secure the information, document in WFMS case notes and create a work task for WG 2 indicating the caller has requested an extension for her pending information. ✓ If the caller states she has submitted all information requested, inquire when it was sent, whether it was sent with a document cover sheet, and whether the documents included her name, Case Number or SSN (depending on when documents were sent, Client may choose to resend or to wait for receipt and processing). ✓ Explain to the caller that she will receive a notice if additional information is required or a notice telling her when a decision has been made on her eligibility. ► In all situations, confirm the caller's mailing address and phone number and if any changes in address are necessary, the call is being **handled by a Tier 2 Eligibility Specialist,** who is responsible for making the needed updates.	

2.13.4 Appointment Rescheduling

2.13.4.1 I need to schedule my interview for a different time.

Action	Script
► After authenticating caller (with name, DOB and Case Number or last 4 digits of SSN), view Case Home page in the WFMS (appointment fields). ► To reschedule the appointment: • Offer the next available appointment found in the system for either a face-to-face interview or data gathering interview depending on the type of interview that was scheduled. (Refer to Section 4.10, Scheduling Instructions and Rules Table <insert hyperlink>) • Enter the caller's information into the scheduler for the date she accepted a rescheduled initial interview using the correct code provided in the Scheduling Rules Table 4.10.5<hyperlink>. 01 Rescheduled app with FS 02 Rescheduled app without FS 03 Rescheduled redetermination with FS 04 Rescheduled redetermination without FS ► Update the WFMS Call Notes regarding the request from the caller, the date and time of the original appointment, and the date and time of the rescheduled appointment.	Follow action steps.

2.13.4.2 I missed my appointment. What can I do now?

Action	Script
► After authenticating the caller, view the Case Home page in the WFMS (appointment fields) to review date, time and reason for appointment. ► If the appointment was for a new application and is not over 30 days from the file date, reschedule appointment using the correct code provided in the Scheduling Rules Table 4.10.5 <hyperlink>. 01=Rescheduled application with Food Stamps; 02=Rescheduled application without Food Stamps. ► If appointment was for a new application for any program and is over 30 days from the file date, explain to the caller that processing time for the application has expired. Offer to screen and/or mail the caller a new application, and provide other application options. ► If appointment was for a re-determination and the certification period has not ended, (it is before the end of the month in which the re-determination is due), reschedule an appointment using the correct code provided in the Scheduling Rules Table 4.10.5 <hyperlink> 03=rescheduled redetermination with Food Stamps; 04=rescheduled redetermination without Food Stamps. ► If appointment was a re-determination and the certification period has ended, explain that the case has closed and offer to screen and/or mail Client another application, and provide other application options.	Follow action steps.

2.13.4.3 I need to make an appointment. (Handled by Tier 1)

Action	Script
► Ask the caller the reason that she wants an appointment and offer to be of assistance. ► If caller is referring to a notice received, navigate to Correspondence History in WFMS or ICES to review the notice with the caller. ► If caller has just submitted an application or is in the process of submitting an application, determine what the caller is applying for and explain that an appointment notice is sent once the application is received and reviewed. Confirm caller's address in the system is correct. ► **Note**: If caller provides sufficient information to indicate she is seeking Food Stamps and may qualify for expedited processing, review the responses to expedited questions from the caller's application in WFMS. Or, if no application has been received yet, offer to screen caller for potentially expedited processing and offer options including scheduling an appointment at the closest FSSA/DFR office (also known as Help Center) the next business day, mailing an application, or applying on-line. ► If the caller is making an Impact appointment, explain that is done with the specific Help Center and that you will transfer. ► Instruct caller that once transferred, caller should press '1' (for English/Spanish), press '2' (to get to the Impact Center), then enter their zip code to get to the Help Center nearest them. To actually transfer the call back into the IVR enter code of '5579'. ► If the caller provides another reason, explain that appointments	Follow action steps.

Action	Script
are scheduled related to processing applications and cases. ► Based on the caller’s reason for requesting an appointment, you may need to create a task for another workgroup (such as Complaints, Changes, etc.).	

2.13.5 Letters, Notices (Handled by Tier 2 ES)

2.13.5.1 I got a letter from you and don’t understand it. Can you help me?

Action	Script
► Ask caller what the notice says while you navigate to the Correspondence History (in WFMS and ICES) to locate it. ► Check the notes in the case (in ICES and/or WFMS) to find out the most recent action that took place on the case which may also list the forms recently sent to the Client. ► If you do not find anything in the notes, check the notice history screen in ICES (CNHS using the ICES Case Number). This will list all the recent notices that have been sent out of ICES to the Client. ► Provide an explanation in response to the caller’s questions.	Yes, I can. While I check our records, do you have the letter in front of you? What questions do you have about it? Follow action steps.

2.13.5.2 I received a re-determination form in the mail. Why do I have to complete this? I am already getting benefits.

Action	Script
► Handled by Tier 2 ES ► After authenticating caller, follow script. ► Attempt to determine which form the Client is calling about and respond accordingly.	Every case must be re-evaluated to determine if benefits will continue. How often this review must be completed depends on the circumstances of your case. It is important that you provide the information requested if you still want to receive benefits. You will receive several mailings. ✓ One is for a scheduled interview and it is very important for you to be available during your scheduled time so that we can update our information about your current situation. ✓ After the interview, you will get a written request for copies of any verification documents that we need by the due date shown. Shortly after that, you will get a summary of the information you provided to

Action	Script
	us in the interview. You need to review it, sign it, and mail or fax it back to us. You may also take it to a local FSSA/DFR office (also called Help Center.) If you received a Document Cover Sheet with these mailings, be sure and send a copy of it back with any verification documents you send us and write your name and Case Number or SSN on each document.

2.13.5.3 I received a letter telling me that my 24 month clock has expired. What does that mean and what do I do now?

Action	Script
► Handled by Tier 2 ES ► Authenticate the caller. ► If caller is not authenticated, continue to provide general script information, but not case-specific information.	You have reached the end of the time you are eligible to receive Cash Assistance Benefits unless you are granted an extension for additional months. You can request an extension to the months you receive Cash Assistance benefits. This is explained in the letter you received. Do you understand what you need to do to request an extension? You must complete the back of the notice you received or you can write the reason you feel you should be considered for an extension, and send the notice containing the request to us. We will then process your request and then a decision will be made regarding your request.

2.13.5.4 I forgot to send in the form you sent me regarding my Medicaid. Can I still send it in?

Action	Script
► Handled by Tier 2 ES ► Authenticate caller. ► Ask the caller if she knows the name of the form or what the form that was sent to her was for. ► If it was for a re-determination, view the Case Home page so you can access the case information and check to see if the caller is still eligible or will need to reapply.	Do you have the form in front of you or do you recall what the form was for? Follow action steps.

Action	Script
► If the caller needs to reapply, offer to complete a screening with the caller on the phone, explain that a new application will be sent to her, and ask that she make sure to sign and return the application with copies of all verifications that are needed. ► If she declines to be screened, offer to send a new application form in the mail OR ► Instruct the caller that she may also reapply for assistance on the web site for self service. ► Instruct caller she can also apply at her local FSSA/DFR office (also called Help Center) at <provide address>. ► If the caller is still eligible, check the pending verification checklist for what information might be pending, review it with the caller, and explain the due date by which the information must be received. ► If the caller says she cannot get the information back in by that due date then create a task for WG 2 or 3 (depending on the case status) indicating that the caller would like an extension on the due date for pending information.	

2.13.5.5 I lost the form you sent me. Can you send me another one?

Action	Script
► Handled by Tier 2 ES ► After authenticating caller, ask if the caller knows what the form was about or when it was sent. ► Navigate to WFMS and ICES Correspondence History to view correspondence sent within the time frame provided by caller.	Do you recall what the form was for? Follow action steps.

Action	Script
► If several items were mailed during that time frame, review them to narrow which one the caller is referencing. ► If sent from WFMS, follow Sending Notices work instructions (Refer to Section 3.11.4, Sending Notices <insert hyperlink>) to mail another copy of the original notice. ► If sent from ICES, resend the notice. Navigate to the CNHS screen, put number of notice you wish to see in selection field, and press **Enter**. When notice screen comes up, press **F23** to have a duplicate of the notice sent.	

2.13.5.6 Why am I getting a notice reducing my benefits due to a sanction?

Action	Script
► **Handled by Tier 2 ES** ► Ask for identifying information and review the notice that was sent to the Client and the case notes in ICES to find out why the individual is sanctioned. ► Explain the reason for the sanction. ► If the caller wishes to file an appeal on this decision provide her with the information on how to do this (Refer to Section 2.13.13, Complaints and Appeals <insert hyperlink>).	We send you a notice anytime a change is made in your benefits. The notice should provide you with the reason why you are sanctioned. Follow action steps.

2.13.5.7 I received a letter requesting I send in pay stubs. How many do I need to send in?

Action	Script
► **Handled by Tier 2 ES** ► Ask the caller for any identifying information so you can retrieve her case information.	Follow action steps.

Action	Script
► Review the case notes and the copy of the Pending Notice that was sent to the caller. ► Check to see what program or programs the caller has applied for and let the caller know how many pay stubs are required be submitted, consistent with policy.	

2.13.5.8 I'm calling to give you the information you asked for.

Action	Script
► **Handled by Tier 2 ES** ► Authenticate caller. Navigate to the pending verification checklist and case notes in WFM and ICES to determine what information was requested. ► Document in Call Notes the information that the caller is providing during the call. If the information needs to be verified, explain to the caller how and where to submit copies of any required verification. ► Create a task for the workgroup that requested the verification.	Let me review our records to see what was requested.

2.13.5.9 I got a letter from you asking me for information but I can't get that information. What do I do now?

Action	Script
Refer to Section 2.13.2.6, What do I do if I can't get the information you've asked me for? <insert hyperlink>.	

2.13.6 Program-Specific Questions: Food Stamps

2.13.6.1 What is the Food Stamp Program?

Action	Script
► Follow script.	The Food Stamp program is a federally funded program to help low-income families purchase food at local stores, farmer's markets and other locations approved by the United States Department of Agriculture. Food Stamp assistance is available to qualifying families, elderly people, and single adults. Many working people and people who are elderly or disabled use food stamps.

2.13.6.2 What can I buy with Food Stamps?

Action	Script
► Follow script.	With food stamps you can purchase food for your household to prepare and eat -- food such as bread, cereal, fruits and vegetables, meat, fish, poultry, and dairy products, as well as seeds and plants to produce food.

2.13.6.3 How do I apply for Food Stamps?

Action	Script
► Refer to Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink>	

2.13.6.4 How do I find out if I might be eligible for Food Stamps?

Action	Script
► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	

2.13.6.5 How much can I earn and still be eligible for Food Stamps?

Action	Script
► Follow script. ► If caller agrees, proceed to screening per Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	There are gross and net income limits. Gross income is your income before taxes and other deductions; net income is the amount left over after the deductions we can allow. The federal government sets these limits. They vary depending on the number of people in your household and other factors. Households with at least one member who is disabled or age 60 or older only have to meet the net income limits. We can ask you a few questions over the phone to see if you might be eligible, and then you can decide whether or not to apply.

2.13.6.6 What information do I need to provide when applying for Food Stamps?

Action	Script
► Follow script. ► If caller agrees, proceed to screening per Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	Households must meet eligibility requirements and provide information – and verification – about the household circumstances that relate to these requirements. When you request an application, you'll get a list of the information we need to complete processing your application. I can ask you some screening questions during this call that would let you know if you are potentially eligible, before you decide to complete an application.

2.13.6.7 I have no food and I need help right away. Can I get help today?

Action	Script
► Authentication is not required to provide general information. ► Attempt to authenticate caller. If the caller is authenticated, review Case Home and Assistance Group status to determine if the caller is already receiving Food Stamps for the current month. If so, caller would not qualify for expedited services.	We can complete a benefit screening to see if you might qualify for expedited processing of an application for Food Stamps, and I can help you with the screening on the phone now. (Begin screening.) If you qualify for expedited processing and decide to apply, I can schedule an appointment at the local office closest to you (today or the next business day). If you are unable to get to the office for some

Action	Script
Refer caller to local community resources such as local food banks/food pantries (or to 2-1-1, United Way if available in their community or the Indiana Family Helpline at 1-800-433-0746. ► If the caller is not currently receiving Food Stamps, conduct screening and provide application options, including potential eligibility for expedited processing.	reason, I can mail you an application or you can apply over the internet, if you have access. When we received your signed application, an appointment would then be scheduled. If you provide all required information, a decision will be made at the appointment whether you qualify for Food Stamps, and if you qualify, when you can receive Food Stamps benefits. However, just to let you know, even if you were to come in today for your interview, you will not receive Food Stamps until the next day. We cannot provide same day benefits as all benefits are available on the Hoosier Works card.

2.13.6.8 Who is eligible for Food Stamps?

Action	Script
► Authentication is not needed since general information is being requested. ► Follow script.	Anyone can qualify for Food Stamps as long as: ✓ The income and resources in the household do not exceed the standard guidelines. ✓ The applicants are residents of Indiana. ✓ The applicants are U.S. citizens, or have a U.S. Immigration status that can be verified and meets program requirements. ✓ Applicants complete any work registration or comply with the work requirements if the individual is able to work. ✓ Any required verifications are provided. ✓ Applicant complies with the requirement for an interview.

2.13.6.9 There was a fire (or flood or other disaster) and my food was destroyed. Can I get help with food?

Action	Script
► Follow script. ► Determine when the food was destroyed to determine if it is consistent with State policy on replacing destroyed food. ► Refer to local food bank/food	I'm sorry that happened to you. Destroyed food is replaced under certain conditions, and the fastest way to find out if the food can be replaced is for you to go to the nearest local FSSA/DFR office (Help Center). I can give you that address if you don't know where it is. You will need to fill out a form at the office, and if

Action	Script
pantry/211.	you have proof, such as a report from the Fire Department or Red Cross, bring it with you. A State eligibility consultant will determine if you qualify to have the food replaced. In the meantime, there may be a local food bank/food pantry in your area that can assist you.

2.13.6.10 I am in college. Can I get Food Stamps?

Action	Script
► Authentication is not required since caller is seeking general information. ► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	You may complete an eligibility screening to see if you are potentially eligible either by phone now or on-line at any time. To qualify for Food Stamps, you must be attending school at least half-time and either working 20 hours per week or working under a work study grant through school. You would need to provide proof of this as part of the application process. If you would like to complete the screening process, we can do that now or you can do it on our website at www.in.gov/fssa and click Apply for Benefits or if you tell me your county I can give you the address to your local FSSA/DFR office (also called Help Center) and you can apply there. <Provide address of Help Center location.>

2.13.6.11 What is the asset/resource limit for my household?

Action	Script
► **Transfer to PRT** ► If the caller is authenticated, you may provide case specific information. Otherwise, provide a general response per the script.	Most of the programs offered have a $2,000 per household limit. Households with one or more members who are disabled, blind, or at least age 60 have a $3,000 limit. Hoosier Healthwise for pregnant women and children do not have any limits on resources a household may have. It appears as though your household has $____ in countable resources.

2.13.6.12 What is an asset or a resource?

Action	Script
► If the caller is authenticated, you may provide case specific information. Otherwise, provide a general response per the script.	An asset or resource can be anything of value that you or someone in your household owns. Examples are: cash on hand, bank accounts, IRA accounts, certificates of deposit, real estate, vehicles and personal property. The home you live in and the lot it sits on do not count as an asset or resource for Food Stamps. However, if you receive or apply for Medicaid for the Disabled, Aged, or Blind your home and the land it is on can be counted towards the resource limits that a household may have.

2.13.6.13 Can I have a car and still get Food Stamps?

Action	Script
► If caller is authenticated, you may provide case specific information. Otherwise, provide a general response per the script.	Yes, you can have a car and still receive Food Stamps. However, if you have more than one vehicle, the other vehicle can be included in the amount of resources allowed that determines your eligibility. The amount owed on your vehicle is subtracted from the current market value and that is what is used to determine how much is counted in your budget.

2.13.6.14 I understand they don’t use Food Stamp coupons any more. How do I get my benefits?

Action	Script
► If caller is authenticated, you may provide case specific information. Otherwise, provide a general response per the script.	You will receive a plastic card, which looks and is used like a debit card, called the Hoosier Works card. The card is used to buy food at grocery stores and markets that accept Food Stamps. Each card has an account number and a Personal Identification Number (PIN). If you don't currently have a Hoosier Works card, we'll mail you one within three to five days after the approval of your benefits. You'll also receive instructions on how to activate the card. If you had a card from a previous certification and lost it, you'll

	need to request another card by calling the EBT Customer Service Automated Response Unit at 1-877-768-5098. This is also the number to call for any other questions about the Hoosier Works card.

2.13.6.15 What is the difference between gross and net income?

Action	Script
► If the caller is authenticated, you may provide case specific information. Otherwise, provide a general response per the script.	Gross income is the amount of income you have before taxes, insurance or other deductions are subtracted from your pay. Net income is the amount you bring home after the deductions are subtracted.

2.13.6.16 My mother just moved in with me and she receives Food Stamps. Can she still receive Food Stamps?

Action	Script
► Provide general script information. ► Create a Reported Change task for WG3.	There are many different factors that will determine if your mother can still receive Food Stamps. These include whether you purchase and prepare food together and how old you are. If you are not currently an Authorized Representative for your mother, then you need to have your mother contact our office and report her change in address and other information. If your mother is with you now, I can take her reported change, and she will receive a notice letting her know what information she needs to provide and any changes that may occur in her benefits. (If her mother isn't there, take the change information and create a Reported Change task for WG 3.)

2.13.7 Program-Specific Questions: TANF

2.13.7.1 What is TANF?

Action	Script
► Follow script. ► Explore whether caller would like to be screened for potential eligibility following Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	TANF is Temporary Assistance for Needy Families, a program that provides temporary cash assistance and supportive services to families with children, helping the family achieve economic self-sufficiency. Families receive a monthly cash grant and may also receive Medicaid until they become self sufficient.

2.13.7.2 How do I qualify for Cash Assistance?

Action	Script
► Follow script. ► Explore whether caller would like to be screened for potential eligibility following Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	To apply for TANF you must complete an application and provide information regarding the children, parents of the children, and all other household members whose income and needs will determine the family's eligibility. This includes providing Social Security numbers and citizenship or immigration status, and meeting Indiana residency and child support cooperation requirements. Also, because cash assistance is temporary, there are work requirements including job orientation and search and readiness activities. Support services are available to assist you in participating in job activities. Also, the application process usually includes an interview. If we need to interview you, you'll receive a notice with the scheduling details.

2.13.7.3 How do I apply for Cash Assistance?

Action	Script
► Provide script information. ► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>. ► Also refer to Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink>.	You may complete a benefit screening to determine if you are potentially eligible for Cash Assistance, and I can help you with the screening on the phone now. If you decide to apply, the information from the screening can be used to fill in part of your application. We can then mail that application to you so you can complete, sign and return it to us. (See referenced scripts for other options.)

2.13.7.4 How long does it take to process an application for TANF?

Action	Script
► Provide general script response. ► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink> and Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink>. if caller is interested in screening or application process.	That depends on how quickly you submit your completed application and any required proof we may need and request you to provide. Once you submit an application, it may take up to 45 days for processing and for the State to make a decision regarding your eligibility.

2.13.7.5 I have a house my dad will give me that we live in. Can I still get Cash Assistance?

Action	Script
► Provide general script response.	The house you live is not counted against you; however, if you own a house and do not live in it, then it is considered a resource and will be used to determine your eligibility for assistance.

2.13.7.6 How much money can I get for my baby and me?

Action	Script
► Provide general script response. ► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	Usually the amount of benefits you receive will be based on the number of people in your family and the total income available to the family. There are several factors that can determine your amount of benefits. You are welcome to complete a screening with me over the phone now or you can go to our website at www.in.gov/fssa and click Apply for Benefits to see if you are potentially eligible for assistance.

2.13.7.7 I'm pregnant and don't have a job. Can I get Cash Assistance?

Action	Script
► If caller is authenticated, case specific information can be provided. Otherwise, follow general script. ► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	Unless you already have another child, you are not eligible to receive Cash Assistance while you are pregnant. Cash Assistance is also called TANF, which stands for Temporary Assistance for Needy Families. You must have a dependent child under age 18 in your household to qualify for cash assistance, along with other income and resource requirements. You can apply for TANF after you have the baby if you choose to. However, you may be eligible for other benefits such as Medicaid and Food Stamps. Would you like to be screened to find out if you may be eligible for those benefits?

2.13.8 Program-Specific Questions: Medicaid

2.13.8.1 What does Medicaid cover?

Action	Script
► Provide script response.	In most cases, Medicaid pays for doctors' services, laboratory and X-ray charges, medicines, nursing facility and hospital services, family planning, eyeglasses, hearing aids, ambulance, podiatry, chiropractic, maternity, nurse midwife, and other health care services.

2.13.8.2 How do I apply for Medicaid?

Action	Script
► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink> and Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink>.	Follow action steps.

2.13.8.3 How long does it take to process an application for Medicaid?

Action	Script
► Follow script.	That depends on how quickly you submit your completed application and any required proof we may need and ask you to provide. Once you submit an application, it may take up to 45 days for processing and to determine your eligibility. If you claim to be disabled, it could take up to 90 days.

2.13.8.4 What information do I need to provide to apply for Medicaid?

Action	Script
► Follow script.	Households must meet eligibility requirements and provide information – and verification – about

Action	Script
	household circumstances. When you request an application, we'll send you a list of information you need to provide so we can process your application. Examples include proof of citizenship or immigration status, identity, income, resources and other kinds of information. If you would like to apply, I can send you an application and list of documents you would be asked for. You can also get the list and application on our web site at www.in.gov/fssa and click Apply for Benefits or at a local FSSA/DFR office, also called a Help Center.

2.13.8.5 If I've submitted an application for Medicaid, what happens next?

Action	Script
► Follow script.	First, we review the information that you provide. If we need more information or need to speak with you further about your application, we'll notify you. You'll also receive a letter telling you whether your application has been approved or denied.

2.13.8.6 How much money can I make and still receive Medicaid?

Action	Script
► Follow script. ► Offer to screen per Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>. ► If needed, transfer call to PRT (Problem Resolution Team).	Medicaid has established requirements for income and resources that can be used to determine your eligibility for any of the Medicaid programs.

2.13.8.7 I didn't receive my Medicaid card.

Action	Script
► **Transfer to PRT (Problem Resolution Team)**	Let me check into that and see if the card is in the mail to you before requesting a new one.

Action	Script
► Authenticate caller. Follow script. ► To check whether/when the caller has been mailed a card in ICES 1. Enter 'IQMA' in TRANS. 2. Enter caller's Social Security or RID number in PARMS. 3. Press **Enter**. ► The screen will display the history of all Medicaid cards and date issued to Client. ► To request a new or replacement card: 1. Request Client's RID or SSN. 2. On ICES screen, enter 'BIMD' in TRANS and the RID or SSN in PARMS. 3. Press **Enter**. 4. Verify the information on the BIMD screen is correct 5. Enter correct code to have card issued. '801' lost card '802' card was stolen '803' card destroyed '804' card never received '821' replacement due to re-enrollment 6. Enter a 'Y' where asked if this is the card you wish to replace. 7. Press **Enter**. Card replacement request will be processed.	If not found or issue date is not very recent: I can take information we need and will have a new card sent to you. I need to get your: ✓ Name (first and last). ✓ Social Security Number or RID number. Make sure to confirm caller's mailing address.

2.13.8.8 I lost my Medicaid card (or My Medicaid card was stolen). How do I get a new one?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller. ► Follow script.	I can take information we need and will have a new card sent to you. I need to get your: ✓ Name (first and last).

Action	Script
► If caller has been approved for Medicaid but lost their previous card, order another card. 1. Request Client's RID or SSN. 2. On ICES screen, enter 'BIMD' in TRANS and the RID or SSN in PARMS. 3. Press **Enter**. 4. Verify the information on the BIMD screen is correct. 5. Enter the correct reason code for loss of card. '801' lost card '802' card was stolen '803' card destroyed '804' card never received 6. Enter a 'Y' where asked if this is the card you wish to replace. 7. Press **Enter**.	✓ Social Security Number or RID number. Make sure to confirm caller's mailing address.

2.13.8.9 I lost my Medicaid card and need to go to the doctor. Can you give me my Medicaid number over the phone?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller. Verify the caller's information in WFMS and ICES. ► Make sure the caller is in the case for which she is asking for the Medicaid number. ► In ICES, retrieve RID (Client's Medicaid number) by putting 'AECCR' in TRANS with either Client's social security number or Case Number. AECCR will display the information. ► Let the caller know that she will need to provide the doctor with a copy of the card once he or she receives a new one in the mail.	Follow action steps.

Action	Script
► Offer to order a new card for the caller. ► Request a new card using ICES. ► If caller has been approved for Medicaid but lost their previous card, order another card. 1. Request Client's RID or SSN. 2. On ICES screen, enter 'BIMD' in TRANS and the RID or SSN in PARMS. 3. Press **Enter**. 4. Verify the information on the BIMD screen is correct. 5. Enter the correct reason code for loss of card. '801' lost card '802' card was stolen '803' card destroyed '804' card never received 6. Enter a 'Y' where asked if this is the card you wish to replace. 7. Press **Enter**.	

2.13.8.10 My Medicaid card does not work.

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller (name, DOB, and Case Number or SSN). ► Check Case Home page and review AG status for Medicaid. ► Review ICES case notes for changes in benefits, such as the closure of an individual's or the entire case's Medicaid. Inform caller of the change. ► If no action has been taken to discontinue Medicaid coverage, refer caller to EDS at 1-800-457-4584.	Let me check into your case. While I am doing that, can you tell me whether you were at a doctor's office, clinic, pharmacy, or other medical provider when you found the card did not work? If so, do you recall what the error message was at that location? If you were not (at a provider), why do you believe the card is not working?

2.13.8.11 The name/date of birth/sex code is wrong on my/my child's Medicaid card.

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller (name, DOB, and Case Number or SSN). ► Determine child to which caller is referring. ► From the Case Home, go to Documents and view the document list to search for the proof of birth or identity submitted for the individual with the error. ► If the error is confirmed, make correction in ICES and follow procedures to issue a new Medicaid card for the individual. ► Confirm the mailing address and phone number for the case. ► If a change is reported in mailing address and/or phone number, update the caller's information in ICES.	Follow action steps.

2.13.8.12 I don't understand Medicaid Spend-down. Can you explain what that means?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller. Otherwise provide only general script response and no case-specific information. ► Provide script response.	Spend-down is the difference between your current income and the income guidelines that are established for Medicaid. If your monthly income is over the established guideline for Medicaid, then the difference between your income and the Medicaid guidelines are subtracted and the left over, or remaining amount is the amount that you are responsible for paying out of pocket before Medicaid will pick up any of your monthly, medical costs. Every month you will need to meet your spend-down by either paying for prescriptions, doctor's

Action	Script
	visits, tests, or other medical treatments/procedures you have received. Once you meet your spend-down or pay that difference between your income and the Medicaid income limit, Medicaid will help cover the rest of your monthly medical expenses.

2.13.8.13 I (or a household member) am pregnant. How can I get help with the medical bills?

Action	Script
► Offer to screen and provide application options. (Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink> and Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink>.	A Medicaid program is available specifically for pregnant women. You must provide proof of citizenship, income, any other insurance coverage you might have, and proof of pregnancy from a medical professional that includes an estimated due date of delivery as verification for this program.

2.13.8.14 I'm getting a bill and I'm on Medicaid. Why aren't my bills being paid?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller and check Case and AG status from Case Home page. ► Verify that the caller is still eligible for Medicaid. ► Discuss Medicaid coverage and proper use of the card with caller. Determine if the number has been given to the provider. Assist the caller with resolving how to use card and ask caller to follow up so that provider has number for billing. ► Ask the caller if the notice is a bill or just an explanation of benefits	Follow action steps.

Action	Script
(EOB) notice. ► If it is an EOB notice: ✓ Explain that it is not a bill, but just a summary of services that the Client received and the accompanying costs that she can be charged for. ✓ Explain that the caller does not have to respond to the notice, but to keep the copy for a later date if needed. ► If it is not an EOB notice: ✓ Ask the caller if he or she gave the Medicaid card to the provider when she went in for services. ✓ If the caller did not give the card to the provider, instruct the caller that at every visit, for every procedure, test, or prescription that the Client gets, she must provide a copy of the card at the time of service. ► Make sure the Client understands what spend-down is and if not, explain what that means. (Section 2.13.8, Program-Specific Questions: Medicaid <insert hyperlink>). ► If the Client has a spend-down, check ICES to make sure that the spend-down was met before the date of service the bill was for. ► If the caller did not meet her spend-down prior to the date of service on the bill, explain that they are responsible for the bill and to contact the provider to pay this bill. ► If spend-down was met, instruct the caller to contact her provider and make sure that the provider's system recognized that spend-down was met and to resolve the bill with the caller.	

2.13.8.15 I just had a baby. When will I get her Medicaid card?

Action	Script
► **Handled by Tier 1** ► Authenticate caller and check Case and AG status from Case Home page. ► If the child's birth has not been reported, follow script 2.13.11.12 <insert hyperlink> for client calling to report birth of baby. Be sure to create a User Defined task from within the case, Enter "New Baby" as the Subject, select a date of 6 business days from the current date and 16:00 as the time, and select Applications Hoosier Healthwise as the Work Queue. In the Comments field, enter the baby's first, middle, and last name; the date of birth, race, and sex of the baby; and whether the caller gave the hospital permission to apply for a Social Security card. Then click Save. ► Inform the caller that the information will be processed, and they should receive a card in 10 days to 2 weeks.	Follow action steps.

2.13.8.16 I just got out of jail and need medical care. Can you help me?

Action	Script
► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>	We can complete a screening while you are on the phone to see if you are potentially eligible for benefits. Would you like to do that now?

2.13.8.17 I need to apply for Medicaid.

Action	Script

Action	Script
► Refer to Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	We can complete a screening while you are on the phone to see if you are potentially eligible for benefits. Once the screening is completed we will mail you an application with all the information you provided filled in and you will need to sign that form and return it will all verifications so we can process your application as quickly as we can. Would you like to start the screening process now? If not, I can send you an application in the mail or you can go to our website at www.in.gov/fssa and click Apply for Benefits. You may also pick up an application at your local FSSA/DFR office, also called a Help Center <provide address if Client wants to pick this option>.

2.13.8.18 I want to talk to someone about Medicaid. I don’t understand my benefits and how to access them.

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller and review Case and AG Status shown on Case Home page to review what benefits the caller is actually receiving. ► Discuss caller’s questions and attempt to explain and resolve any issues that are raised. ► Provide caller with EDS phone numbers 1-317-713-9627 or 1-800-457-4584 for program specific information. ► If caller did not receive a Medicaid card, then order a card for them via ICES (Section 2.13.8.8, I lost my Medicaid care (or My Medicaid card was stolen) How do I get a new one? <insert hyperlink>).	Follow action steps.

2.13.8.19 My child is turning 18. Will he lose his Medicaid?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller and review Case and AG status from Case Home page. ► Explain to the caller that depending on what the household income is, his or her child may or may not be eligible to stay on Hoosier Healthwise benefits. ► Explain that if the child turns 18 and the income in the household is within the guidelines, and then he or she may be eligible to receive Hoosier Healthwise until age 19. However, if the household can qualify based on income, the child	Follow action steps.

Action	Script
might be covered until he or she turns 21.	

2.13.8.20 The Medicaid for my child was closed, but he is still in school. Can he still get Medicaid until he finishes school or moves?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller and review Case and AG status from Case Home page.	Medicaid coverage is not determined by whether or not a child is in school. We use household income to determine if a child can qualify for Medicaid. If you recently had a change in income, that will affect if your child is still eligible for Medicaid. If you would like to appeal the decision made on your child's Medicaid benefits you can submit a written request for a fair hearing. If you do: ✓ A hearing date and time will be scheduled for you with a hearings officer. ✓ A representative from the office that processed your case will be present. You can bring a witness with you if you feel it is necessary along with any additional information you feel would be useful to the officer making the decision. After the hearing the officer will review all information and you will receive a notice in the mail informing you of that decision. If you would like to request a fair hearing, you will need to send a letter requesting an appeal to the State at the following address: FSSA Document Center PO Box 1810 Marion, IN 46952 You may instead fax it to us at 1-800-403-0864. You will receive additional information about your appeal after the letter is received.

2.13.8.21 Can I still get Medicaid if I have other insurance?

Action	Script
► Follow script. ► Refer to Screening Script in Section	Yes. Your insurance becomes your primary coverage. Medicaid will bill your primary insurance

Action	Script
2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink> and Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink> if caller wants to proceed. ► If more complex questions follow, transfer to PRT (Problem Resolution Team).	first and then Medicaid will be billed for the remainder of the bill. To find out if you qualify for Medicaid, you would need to complete the application process.

2.13.8.22 Can I use my Medicaid card in another state?

Action	Script
► Follow script. ► If Client knows their health plan but not the telephone number, access plan and phone number list in the Quick Reference Guide at http://www.indianamedicaid.com/ihcp/Misc_PDF/Quick_Reference.pdf <insert hyperlink>.	Are you enrolled in a health plan or managed care organization? Yes: you would need to contact your health plan to find out. No: you would need to contact EDS for assistance. EDS's member hotline number is 317-713-9627 or 1-800-457-4584.

2.13.8.23 I own my home and need to get Medicaid. I am over 65. Will you take my home when I die?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Follow script.	This will depend on who the beneficiary of your home is; however, it is possible that the State can file a claim against your home's value in order to be reimbursed for any Medical bills that Medicaid has paid on your behalf.

2.13.8.24 Can you pay my Medicare premiums? Other insurance premiums?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Follow script.	There are some categories of Medicaid that pay your Medicare premiums. Medicaid does not pay premiums for any other

Action	Script
► Ask the caller if she would like to screen for potential eligibility. Follow Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	insurance. To find out if you qualify for Medicaid, you will need to complete the application process.

2.13.8.25 What is the difference between Medicare and Medicaid?

Action	Script
► Follow script. ► Be sure to determine if the caller has Medicare and if they are looking for assistance with paying Medicare Premiums. If yes, refer screening script 2.13.8.24.	Medicaid is a health insurance program administered by each state and I can assist you with questions about Medicaid. Medicare is a federal health insurance program administered by the Social Security Administration for people age 65 and older, certain people under 65 with disabilities. If you like I can provide you with a phone number to contact the Social Security Administration, and they can assist you with questions you have about Medicare. You can reach them Monday through Friday, 7:00AM- 7:00p.m. at 1-800-772-1213. ***Note:*** *The following information is for reference by the Call Center agent in response to questions that are asked. The agent should escalate calls requesting more detail to PRT (Problem Resolution Team).* **Medicare Part A** is hospital insurance with no premium for coverage unless a person has not earned sufficient quarters of coverage under Social Security. **Medicare Part B** is a supplementary insurance for physician fees and other services outside a hospital or skilled nursing facility setting. The individual must request coverage and pay a monthly premium for this coverage. In most cases, the part B premium is deducted from the Social Security or Railroad Retirement check. **Medicare Part D** is prescription drug coverage. The recipient is responsible for calendar year deductibles and co-pay liabilities for Parts A, B and D. **Medicaid** is a federally and stated funded and

Action	Script
	provides medical care to eligible needy persons. Eligibility for Medicaid programs is determined based on countable income and resources. Eligibility for Medicaid is determined by the Indiana Family and Social Services Administration. Those groups covered by Medicaid include: ✓ Children ✓ Pregnant women ✓ Adults in Families with dependent children ✓ Individuals with disabilities ✓ Individuals age 65 or over The medical related benefit an individual receives is based on financial guidelines specific to each program. Services potentially covered by Medicaid include: ✓ Ambulance ✓ Doctor's services ✓ Hospital services ✓ Eye glasses ✓ Family planning ✓ Hearing aids ✓ Lab services ✓ Maternity ✓ Medicare Part B premiums ✓ Medicines ✓ Nurse midwife ✓ Nursing facility/assisting living services ✓ X-ray charges

2.13.8.26 How much is my Medicaid Package C premium?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Follow script.	The amount you pay each month is based on family income and the number of family members covered. For Package C, monthly premiums range from $22 to $33 for one child and $33 to $50 for two or more children. These rates can change. It is important to remember that if you miss payments, your

Action	Script
	coverage will end. There are also co-payments for some services such as emergency services, prescriptions, and some dental work.

2.13.8.27 Can I pay my Medicaid premium payment directly to you?

Action	Script
► Follow script.	No, however, I can give you the address where you can mail your premium payments: Hoosier Healthwise for Children P.O. Box 3127 Indianapolis, IN 46206-3127

2.13.8.28 I need written verification of my benefits from the Housing Authority, Energy Assistance (or another Third Party).

Action	Script
► **Handled by Tier 1** ► From within the WFMS case, click Tasks on the Left Navigation, and create a User Defined task, with the Subject "Inquiries" for the Inquiries queue. Enter a due date of 2 business days. ► Enter notes regarding the name and address of the third party requesting verification and whether verification of current benefits or a specific time period, such as the past year, is being requested. ► Upon receipt of the Inquiries task, the verification is provided as follows: ► Users working Inquiries queue**:** 1. Navigate to ICES screen CNHS. 2. Enter Case Number in PARMS. 3. Press **Enter**. 4. Select the notice needed. 5. Press F15. 6. When notice is shown, select **F23** requesting a duplicate notice be sent. This request is for a notice that shows the current benefits received. 7. In ICES CLRC, enter notes on	Follow action steps.

Action	Script
the call and actions taken.	

2.13.8.29 Is there a way I can get emergency coverage until I can get health insurance through my employer/job?

Action	Script
► **Handled by Tier 1** ► Depending on caller's response, reference the Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink> and Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink>.	There is no emergency Medicaid application processing. However, you or your family members may be eligible for Medicaid. To find out if you qualify, you will need to complete the application process. Would you like me to assist you to begin the screening and application process or would you rather complete screening and application on the internet?

2.13.8.30 I need some information about Care Select (or any question you receive about the Care Select program).

Action	Script
► Follow script. ► Refer to 4.31 Care Select Fact Sheet <insert hyperlink>	Care Select is a new care management program created by the State of Indiana for Hoosiers who are aged, blind and disabled. (Refer to 4.31 Care Select Fact Sheet <insert hyperlink> to answer questions.) For more information about the Care Select program, please call the Care Select Helpline at 1-866-963-7383.

2.13.9 Hoosier Healthwise

2.13.9.1 What is Hoosier Healthwise?

Action	Script
► Follow script.	The Hoosier Healthwise Program is a health care program for low income working families, pregnant women, and children. There are three benefit packages in Hoosier Healthwise which cover a wide range of medical services. Some of the services are doctor visits, prescription drugs, mental health care, dental care, and family planning. Indiana families who have enrolled in Hoosier Healthwise receive these benefits at little or no cost. You can receive a Health Plan Summary by calling the toll-free Hoosier Healthwise Helpline at 1-800-889-9949. The Health Plan Summary will provide information about their doctors and services.

2.13.9.2 How can I receive information about the Hoosier Healthwise health plans?

Action	Script
► Follow script.	You can receive a Health Plan Summary by calling the toll-free Hoosier Healthwise Helpline at 1-800-889-9949. The Health Plan Summary will provide information about each plan’s doctors, hospitals, transportation services, drug stores, and other available services.

2.13.9.3 I want to choose a doctor/change doctors.

Action	Script
► Follow script.	To make this change you will need to call 1-800-889-9949 for Hoosier Healthwise.

2.13.9.4 How can I get a list of primary medical providers in my area?

Action	Script
► Follow script.	If you wish to stay in the same health plan, call your

Action	Script
	health plan's Member Services telephone number. You can also get a primary medical provider list by calling the toll-free Hoosier Healthwise Helpline at 1-800-889-9949, visiting the Hoosier Healthwise Web site at http://www.healthcareforhoosiers.com <insert hyperlink>.

2.13.9.5 What number do I call for help with Hoosier Healthwise?

Action	Script
► Follow script.	Call your health plan first. What health plan are you in? (*Provide the appropriate number, based on response*) For Anthem, call 1-888-232-9613. For Managed Health Services, call 1-800-414-5946. For MDwise, call 1-800-356-1204. For Care Select, call 1-866-963-7383. You can also get help by calling the toll-free Hoosier Healthwise Helpline at 1-800-889-9949.

2.13.9.6 How do I apply for Hoosier Healthwise?

Action	Script
► Ask if applying for health coverage for pregnancy and/or children's coverage only and provide the appropriate response for the program requested. ► Provide application options. 1. If caller wants to apply on-line, provide web address: http://www.in.gov/fssa/maternal/hoosier_healthwise/index.html <insert hyperlink>. 2. If caller wants an application mailed, click *Apply Now* to mail an application. 3. If caller wants to locate or apply at an Enrollment Center, navigate to http://www.in.gov/fssa/maternal/hoosier_healthwise/enrollment.html <insert hyperlink>.	Are you interested in applying for health coverage for pregnancy or for children's health coverage or both? You can apply in several different ways. 1. If you have access to the internet, you can download and print an application. Complete the application, print, sign and mail or fax the application to us. The website is http://www.in.gov/fssa/maternal/hoosier_healthwise/index.html <insert hyperlink>. 2. You can complete a paper application, which we can mail to you (with instructions) and return it by mail to us at: FSSA Document Center, PO Box 1810, Marion, IN 46952 or fax at 1-800-403-0864. 3. You can also bring it to a FSSA/DFR office, also called a Help Center, closest to you. I can give you that address if you don't have it.

Action	Script
and provide nearest enrollment center location, telephone number, hours and whether the center operates by appointment only.	4. You can apply at an Enrollment Center nearest you and someone there can answer questions, make sure the application is complete, and help you choose a doctor for children and/or pregnancy. I can provide you the Enrollment Center address if you need it. (Navigate to: http://www.in.gov/fssa/maternal/hoosier_healthwise/enrollment.html <insert hyperlink> and enter caller's county.)

2.13.9.7 What happens after I submit an application for Hoosier Healthwise?

Action	Script
► Follow script.	Once your application is submitted, we will send you a letter to notify you of any interview required; the date and time of the interview, whether it is over the telephone or in a FSSA/DFR office or Help Center, and what additional information may be required to complete processing the application, and when that information would be due. ✓ When you turn in your application to an Enrollment Center or Help Center, a worker will look over the application and make sure it is complete. You should also pick a doctor and health plan and notify the Enrollment Center or the Hoosier Healthwise Helpline (1-800-889-9949). ✓ Once the application is processed, you will get a letter to let you know whether or not you (or your child) are eligible. If you have not already chosen a doctor and health plan, you will have 30 days to do that or a doctor and health plan will be assigned to you. ✓ If you (or your child) are eligible, you will also get a letter with the name and phone number of your child's doctor and health plan. If it is not the doctor or health plan you chose, call the Hoosier Healthwise Helpline.

2.13.10 Nursing Home Medicaid

2.13.10.1 How do I apply for Medicaid (for myself or someone else) to help pay for Nursing Home Care?

Action	Script
► Offer to screen caller, following Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>. ► Otherwise, follow Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink>.	Follow action steps.

2.13.10.2 How do I find a nursing home that accepts Medicaid?

Action	Script
► Follow script. ► If the caller does not have internet access or requests you to provide the agency for their area, go to the web site and provide the agency telephone number.	You would need to contact your local Area Agency on Aging. You can call 1-800-432-2422 to get the number for the Area Agency on Aging for your community. If you have internet access, those are listed at www.iaaaa.org <insert hyperlink>, or I can access that site for you and give you the agency contact information for your area.

2.13.10.3 What is a liability and how is it figured?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Follow script.	The liability is the amount owed to the nursing facility on a monthly basis. The amount is calculated as follows: A liability is the amount of income a nursing home Client receives, minus allowable deductions (such as medical health insurance or legally imposed guardianship fees not to exceed $35) and a deduction of $52 for personal needs allowances. The money left over after these deductions are the amount of the liability, which the Client is expected

Action	Script
	to pay the nursing home.

2.13.10.4 My mother went into the nursing home, but my dad remains in the home they share. Will my mom be able to get Medicaid and still keep their house?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Follow script. ► Offer to screen the caller for potential eligibility for Medicaid (follow Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>).	There are special guidelines that could assist your mother with nursing home costs through the Medicaid program and let your father continue residing in their home.

2.13.10.5 How do we apply for a waiver for my mother's special in-home needs?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Follow script. ► Offer to screen the caller for potential eligibility for Medicaid (follow Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>). ► Navigate to http://www.iaaaa.org/members/aaalist.asp <insert hyperlink> to get directly to the listings if the caller wants help with Area Agency on Aging contact information for their area.	There are waivers that could assist your mother with her special needs. If she is not already receiving Medicaid, she would need to apply and be approved. I can begin that process with you now by screening her for potential eligibility and providing application options (mail, on-line, State office). To apply for a waiver, you would need to contact your local Area Agency on Aging. You can call 1-800-432-2422 to get the number for the Area Agency on Aging for your community. If you have internet access, those are listed at www.iaaaa.org <insert hyperlink>.

2.13.10.6 My mom lives in a nursing home in Michigan (or another state) and Medicaid pays her bills. We want to transfer her to an

Indiana nursing home and transfer her Medicaid. How do we transfer her Medicaid to Indiana?

Action	Script
► Follow script. ► Offer to screen the caller for potential eligibility for Medicaid (follow Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>).	Medicaid eligibility varies by state. If your mother establishes residency in the State of Indiana, then she needs to apply for Indiana Medicaid.

2.13.10.7 My mother gets Medicaid that pays for her nursing home care. She wants to leave the nursing home and return to her home. Is there any help for when she returns to her home?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Follow script. ► Navigate to http://www.iaaaa.org/members/aaalist.asp <insert hyperlink> to get directly to the listings if the caller wants help with Area Agency on Aging contact information for their area.	Your mother may be eligible for a waiver that could provide in-home services. You may want to discuss her wish to return home with the nursing home, or to apply for a waiver, you would need to contact your local Area Agency on Aging. You can call 1-800-432-2422 to get the number for the Area Agency on Aging for your community. If you have internet access, those are listed at www.iaaaa.org <insert hyperlink>.

2.13.10.8 My mother is in a nursing home and getting Medicaid. How much in resources can my mother have and still be eligible?

Action	Script
Transfer to PRT (Problem Resolution Team) ► Follow script.	If your mother is single, then she can have resources up to $1500. If your mother is legally married, and both partners are in the nursing home, then they can keep resources up to $2250.

2.13.10.9 How do I get an Independent Resource Assessment for my mother?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Ask for and document the name and the contact telephone number of the person calling. ► Ask for the name and DOB of the person needing an Independent Resource Assessment (IRA) to search for any record in WFMS. ► Perform Search (Refer to 3.11.3, Search WI <insert hyperlink>). **Person Found:** ► Confirm mailing address and mail the State Form 2060. Document request in ICES Case Notes. **Person Not Found:** ► A resource assessment case needs to be created in WFMS. ► Confirm name and mailing address of person needing an IRA. ► Either create the case and mail the form during the call if time permits **OR,** ► Initiate a Create an Independent Resource Assessment Request task (user-generated) for WG 4 to create a resource assessment case and send out the 2060 for the person to sign and return. ► Document that the request came via call, name and contact telephone number of caller, and name and contact telephone number (already obtained the address) of person needing IRA, if different. ► Advise the caller or authorized representative to fill out the document, and submit the supporting documents listed on the form.	For our records, may I have your name and a telephone number where you can be reached? Please provide your mother's name and DOB. (After performing search) We'll need to send you a form to fill out and mail or fax back to us. We'll also need you to send certain documents with the form such as bank statements, deeds, and other proof of your mother's resources. We will send you instructions and a Document Cover Sheet for returning the information we need. After you send the completed form back, we will schedule an interview to complete the assessment process.

2.13.10.10 Calls from Area Agencies on Aging Regarding Applicants for Medicaid Waivers

Background information for agents:

- *Area Agencies on Aging (AAA) assist applicants/clients complete applications for Medicaid Waivers (Aged and Disabled, Autism, Support Services, etc.). Case managers from these agencies will call to check the status of the Waiver, seek help with Medicaid Waiver Budgeting or other help with Medicaid Waiver Processing. Since the AAAs are working with the State of Indiana, an Authorized Representative document does not need to be completed to discuss the waiver and the applicant/client's Medicaid benefits.*

- *WG 12 Nursing Homes/Waivers is responsible for processing Medicaid applications associated with Medicaid Waivers.*

- *This script is used when a call comes in from a representative of an Area Agency on Aging related to Waivers.*

Action	Script
► Handled by Tier 2 ► The caller, from an agency that helps individuals apply for Medicaid waivers, asks a question related to or needs to provide information related to the Medicaid Waiver that the applicant/client has applied for.	We have a team of specialists who handle Medicaid waiver cases, and I'll need to get some information from you for a team member to call you back.
► Ask the Caller for her name, the agency she is calling from, phone number, the name of the client she is calling about, what the call is related to, and either the RID number of the client or the case number. (If caller does not have this information, gather DOB and last 4 digits of SSN and search to locate client.) Enter all information provided by the caller in the WFMS case notes.	May I please have the following information: your name, the agency you are calling from, the number where you can be reached, the name of the client you are calling about, the reason for the call, and the client's case or RID number (or DOB and last 4 digits of SSN so agent can search to locate case)? I am sending this information to the team, and a specialist will be calling you back as soon as possible.
► Explain to the caller that you are forwarding this request to a team of specialists who handle Medicaid waiver cases, and that someone on that team will get back with her as soon as possible. ► Conclude the call. ► From within the WFMS case, go to	Thank you for calling the Indiana Family and Social Services Administration.

Action	Script
Tasks on Left Navigation, click Create Task, click User Defined, and create a User Defined task, Subject "Return Call to AAA" for the Nursing Home/Waivers work queue. WG 12 works tasks in this queue and will contact the caller regarding the Medicaid Waiver.	

2.13.11 Change Reporting

2.13.11.1 What kind of changes do I need to report?

Action	Script
► **Handled by Tier 1** ► After authenticating caller, view Case Home page and each AG status to identify what programs Client is approved to receive. ► Provide response consistent with policy for the specific programs Client is receiving. ► If necessary, escalate to PRT.	Most programs have their own policies about what types of changes you need to report. Most programs require that you report changes in your address, persons living with you, and your income and assets. You should also review the notice of eligibility you received which specifies the types of changes you need to report based on the benefits you're receiving. For the (program name) program, you need to report (insert specifics).

2.13.11.2 (Someone) in my household moved out/moved in.

Action	Script
► **Handled by Tier 1** ► Authenticate caller. If you are unable to authenticate caller, take the change report but do not provide any information regarding the case. ► Follow steps in 4.22 Processing a Call to Report a Change <insert hyperlink> to enter the change on-line. ► If the caller is reporting that someone has moved out of the household, ask the caller for the following information: ✓ Name of individual who moved out	Follow action steps.

Action	Script
of the household; ✓ New address for the individual that moved; ✓ If there is any change in the amount of rent or utilities the caller is now responsible for. If yes, let the caller know she will need to turn in proof of this change. ► If an individual has moved in to the household, ask the caller for the following information: ✓ Name of the individual who moved into the household; ✓ Social Security Number of the individual; ✓ Birth date of the individual; ✓ Ask if the individual will be purchasing/preparing food with the rest of the household. ✓ Ask if the individual has any resources and/or income ✓ Ask if the individual is related to anyone in the household ✓ Ask if the individual is going to pay any of the shelter costs, and if so how much. ✓ Ask if the individual will need an application sent to her or if the individual was already receiving benefits. ► Let the caller know that she will receive a notice in the mail from us requesting verification of the reported changes. Explain that the caller and individual will need to make sure to submit via mail, fax, or in person at a FSSA/DFR office, also called a Help Center, copies of verification documents that are requested, along with the bar-coded Document Cover Sheet that will be enclosed with the notice. Remind caller to write name and SSN or Case Number on copies of any documents submitted.	

Action	Script
► Update Call Notes in WFMS regarding all the information and changes that the caller reported. ► If the person moving out also has a HIP case and is moving out of Indiana, go to the HIP case, select Tasks on the Left Navigation bar, and create a “Reported Change” task that is sent to HIP WG3.	

2.13.11.3 I moved and want to let you know my new address.

Action	Script
► **Handled by Tier 1** 1. After authenticating caller, view the Case Home page information. 2. Follow steps in 4.22 Processing a Call to Report a Change <insert hyperlink> to enter the change on-line. or – if instructed by your manager – take the following actions: 3. Ask the caller for his/ her new address and phone number if this is also changing. Enter updates on ICES screen AEICI. 4. Ask if the rent or utilities expenses are changing, and if so, the new amount. 5. Ask the caller who moved with her and determine whether she is now living with someone new to the case. 6. Regardless of whether the change is entered on-line or in ICES, explain to the caller that we will process the change report and send her a Pending Notice explaining what information needs to be mailed/faxed or taken in to a FSSA/DFR office/Help Center	Follow action scripts.

Action	Script
and the due date for us to receive it to verify the change in address and shelter costs. 7. Let the caller know that if she would like to start gathering the needed information, the information needed will be: • Copy of new lease agreement or mortgage statement. • Proof of utilities she is responsible for. • If she is receiving rent assistance, proof of the amount the caller will pay for rent and the amount that the agency providing assistance will pay. 8. If the caller is moving out of State and also has a HIP case, from within the HIP case, select Tasks from the Left Navigation bar and create a Reported Change task for HIP WG3.	

2.13.11.4 When I reported my baby was born, my benefits stayed the same. Why didn't my Cash Assistance increase?

Action	Script
► **Transfer to PRT (Problem Resolution Team)** ► Authenticate caller and review case notes to determine whether change was reported and processed. Review notice in ICES Correspondence History and explain reason provided in notice to Client.	Your notice would explain the reasons benefits were authorized and provide the amount. Let me review our records.

2.13.11.5 My child moved out of the house and in with his father (or other relative).

Action	Script
► Handled by Tier 1	Follow action steps.

Action	Script
▶ After authenticating caller, collect all information related to the change. ▶ Follow steps in 4.22 Processing a Call to Report a Change <insert hyperlink> to enter the change on-line. ▶ For this change, ask for: ✓ The name of the child who moved out of the household. ✓ The date the child moved out of the household. ✓ The new address where the child is living. ✓ The name of the adult with whom the child is living. ▶ Update the ICES case notes with the information provided. Inform the caller that she will receive a notice in the mail if any of the reported information needs to be verified.	

2.13.11.6 I am calling to report that I got a new job.

Action	Script
▶ Handled by Tier 1 ▶ After authenticating caller, follow steps in 4.22 Processing a Call to Report a Change <insert hyperlink> to enter the change on-line. ▶ Collect the following information related to the change and enter in ICES case notes: ✓ The name of the new employer; ✓ The start date; ✓ Pay per hour; ✓ Average hours per week expected to work; ✓ How often paid; ✓ Day of the week paid;	Follow action steps.

Action	Script
✓ Date of first check ✓ (if the client is also receiving HIP) Whether the client now has access to health insurance through the new employer. ► If the caller currently has another job listed in the case, ask if the individual is still employed at that location. ► If the caller is not employed there, then ask for the following: ✓ End date of previous employment; ✓ Reason the individual is no longer employed there; ✓ Date of last pay received; ✓ Gross amount of that pay received. ► Inform the caller that she will receive a notice in the mail if any of the reported information needs to be verified. Inform her that: ✓ The notice will include types of documents (such as pay stubs or statement from employer) she can provide to verify the change; ✓ She can mail or fax copies of verification documents, or submit them at a local FSSA/DFR office/Help Center; ✓ The notice will tell her the due date for us to receive the verifications; ✓ She should submit the bar-coded Document Cover Sheet with any document copies, and ✓ She should write the Client's name and SSN or Case Number on each document submitted. ► Enter an ICES case note with the information the caller provided, what you told the caller, and that you entered the change on-line.. ► If the client also has a HIP case, from within the HIP case, select Tasks from the Left Navigation bar and create a "Reported Change"	

Action	Script
task which is sent to HIP WG3.	

2.13.11.7 I am calling to report that I lost my job.

Action	Script
► Handled by Tier 1 ► After authenticating caller, follow steps in 4.22 Processing a Call to Report a Change <insert hyperlink> to enter the change on-line. ► collect the following information related to the change: ✓ Name of employer; ✓ End date of employment; ✓ Reason for employment ending; ✓ Date of last check received; ✓ Gross amount of the last check received; ✓ If the caller is expecting to receive unemployment or not. ► Enter the information reported in ICES case notes. ► Inform the caller that the notice will be mailed and include the types of documents she can provide to verify the change. ► These would include a written statement from the former employer with the following: ✓ End date of employment ✓ Reason for employment ending ✓ Date of last check to be received ✓ Gross amount of the last check received: ► If she is going to be applying for or receiving unemployment benefits she needs to provide proof of the benefits received within 10 days of the change of income. ► She can mail or fax copies of	Follow action steps.

Action	Script
verification documents, or submit them at a local FSSA/DFR office / Help Center ► The notice will tell her the due date for us to receive the verifications ► She should submit the bar-coded Document Cover Sheet with any document copies and ► She should write the Client's name and SSN or Case Number on each document submitted. ► Update ICES case notes regarding the information the caller provided, what you told the caller, and that you entered the change on-line.	

2.13.11.8 I am calling to report that I got a raise.

Action	Script
► Handled by Tier 1 ► After authenticating caller, follow steps in 4.22 Processing a Call to Report a Change <insert hyperlink> to enter the change on-line. ► Ask caller for the following: ✓ Place of employment; ✓ Date the individual received a raise; ✓ Amount of raise; ✓ Average hours worked per week; ✓ Date that the individual will receive a check with the new hourly rate on it. ► Inform the caller that: ✓ She will receive a notice in the mail if the reported change needs to be verified; ✓ The notice will include an income verification form she can use to verify the change;	Follow action steps.

Action	Script
✓ She can mail or fax copies of verification documents, or submit them at a local FSSA/DFR office/Help Center; ✓ The notice will tell her the due date for us to receive the verifications; ✓ She should submit the bar-coded Document Cover Sheet with any document copies, and ✓ She should write the Client's name and SSN or Case Number on each document submitted. ► Update ICES case notes regarding the information the caller provided, what you told the caller, and that you entered the change on-line.	

2.13.11.9 I am getting a raise in my SSA check. What effect will this have on my benefits?

Action	Script
► **Transfer to Tier 2 ES** ► Authenticate the caller. ► For this change, ask the caller for: ✓ The new amount of SS benefits she will receive. ✓ Date the change is expected to occur. ► Enter the information provided during the call in ICES case notes. ► Check Data Exchange, DERL, in ICES to see if the change is there. If the information is in ICES, that can be used as verification of the change. ► Inform the caller that she will receive a notice in the mail if any of the reported information needs to be verified. ► From within the case, select Tasks from the Left Navigation bar and create a task "Report of Change" to	We can evaluate the effect on your benefits when we receive verification from you regarding the change you are reporting. What is the amount of your new SSA check? When is the increase expected? An increase in your SSA check can affect your benefits by: ✓ Reducing the benefit amount ✓ Increasing your monthly spend-down ✓ Changing what benefits you are eligible for. If we need you to provide proof of this change, we will notify you through the mail. We will also notify you of any change in your benefits as a result of the increase in your Social Security.

Action	Script
WG 3.	

2.13.11.10 My hours were cut. Will my benefits go up?

Action	Script
► **Handled by Tier 1** ► Ask the caller for any identifying information needed in order to retrieve the case information. ► Follow steps in 4.22 Processing a Call to Report a Change <insert hyperlink> to enter the change on-line. ► If the caller is receiving Food Stamps or TANF, let the caller know that she will need to verify that her hours were reduced and after we receive all proof of the change, there could be an increase in benefits. ► The information the caller will need to submit will be: ✓ A statement from the employer verifying that the caller's work hours have been reduced ✓ Reason the benefits are being reduced ✓ When the reduction will be reflected on the caller's pay check ✓ Copy of the past 30 days of pay to verify the reduction in hours (if the caller does not obtain a statement from the employer). ► Explain to the caller that we will send a Pending Notice (Refer to Section 3.11.4, Sending Notices <insert hyperlink>) by mail to request verification of all reported changes and it will include a due date and instructions where to mail or fax copies of the requested verification documents. ► Update the ICES case notes with all information regarding the	Follow action steps.

Action	Script
change the caller reported. ► Inform caller that when the change is processed, they will be notified about the impact on benefits.	

2.13.11.11 I just got married/am getting married. What do I need to report?

Action	Script
► **Transfer to Tier 2 ES** ► After authenticating caller, explain to the caller that she will need to turn in the following verifications: ✓ A copy of the marriage certificate. ✓ A birth certificate or other identifying information for the new spouse. ✓ All income for the past 30 days that the new spouse received. ✓ All resources available to the new spouse (i.e., checking and/or savings accounts, vehicles, property). ► Let the caller know that we will send a Pending Notice by mail to request verification of all reported changes, and that the notice will include a due date for us to receive copies of verification documents and instructions on where to mail or fax them. ► Update the ICES case notes with all information regarding the change the caller reported. ► From within the case, select Tasks from the Left Navigation bar and create a "Reported Change" task which is sent to WG 3.	Follow action steps.

2.13.11.12 I am calling to let you know that I had my baby.

Action	Script
► **Transfer to Tier 2 ES** ► Authenticate caller and retrieve the case information. ► Ask the caller for the baby's first, middle, and last names. ► Ask the caller for the date of birth. ► Ask the caller for the race and sex of the baby. ► Ask the caller if she gave the hospital permission to apply for a Social Security card for the new baby. If not, the caller will need to apply for one at the Social Security office. ► Let the caller know you can add the baby to the case now, that the change will be processed, and that we will send her a Pending Notice by mail to verify the change in her household. ► Explain to the caller that the information that will be needed, if she would like to start getting that together now, will be: ✓ Copy of the birth confirmation letter from the hospital or ✓ Copy of the temporary birth certificate she received at the hospital. ► Also, let the caller know that if the father of the baby is not in the household, she will need to provide as much information on the absent parent as she can (such as full name, address, phone number, date of birth, place of employment). ► Explain to the caller that we will mail a Pending Notice (Refer to Section 3.11.4, Sending Notices <insert hyperlink>) to request verification of the change reported, and that the notice will include a due date for us to receive the requested proof and instructions where to mail or fax copies of the documents.	Follow action steps.

Action	Script
► Update the ICES case notes with all of the information the caller reported regarding the change. ► From within the Case, select Tasks on the Left Navigation bar, and create a User Defined task. Enter “New Baby” as the Subject, select a date of 6 business days from the current date and 16:00 as the time, and select Applications Hoosier Healthwise as the Work Queue. In the Comments field, enter the baby’s first, middle, and last name; the date of birth, race, and sex of the baby; and whether the caller gave the hospital permission to apply for a Social Security card. Then click Save.	

2.13.11.13 If I get married, what effect will it have on my benefits?

Action	Script
► Handled by Tier 1 ► Tell the caller that she may or may not have her benefits reduced or discontinued, but the only way to know for sure is if she turns in all information related to her new spouse; it will be processed and she will be notified of the impact. Until you have all verifications of income, resources, etc. you would not be able to let her know what sort of change she will see in her benefits. ► Let her know if gets married to make sure she mails or faxes to us (or submits at a local FSSA/DFR office/Help Center) the following information within 10 days of the change occurring: ✓ A copy of the marriage certificate. ✓ A birth certificate or other identifying information for the new spouse. ✓ All income for the past 30 days	Follow action steps.

Action	Script
that the new spouse received. ✓ All resources available to the new spouse (such as checking and/or savings accounts, vehicles, property). ► Remind her to put her name and Case Number or SSN on each document copy that is submitted.	

2.13.11.14 I am moving out of state/moved here from another state. Can you transfer my benefits?

Action	Script
► **Handled by Tier 1** ► Tell the caller, that we cannot "transfer" benefits from another state. Ask caller what benefits she was receiving since Food Stamp benefits issued in one state are usually accessible through large retailers in other states. ► If caller is moving to Indiana, let the caller know that he/she must call her former caseworker and report his/her new address and when she moved. ► If caller is moving from Indiana to another State, take and process the change of address information on the case by following steps in 4.22 Processing a Call to Report a Change <insert hyperlink> to enter the change on-line. ► Update ICES case notes with the information reported by the caller. ► If the caller also has a HIP case, go to that case in WFMS and from within that case, select Tasks on the Left Navigation bar to create a Reported Change task. ► If the caller is moving to (a county which has implemented the modernized solution in) Indiana, explain to the caller that if he/she	Follow action steps.

Action	Script
would like to apply for assistance in Indiana she can go to www.in.gov/fssa to apply on-line or you can mail an application to him/her. Reference the Application Processing Script in Section 2.13.2.1, How do I apply for benefits? <insert hyperlink>.	

2.13.11.15 I sold/bought a house.

Action	Script
► **Transfer to Tier 2 ES** ► After authenticating caller, retrieve her case information. ► If the caller BOUGHT a new home, tell the caller she will need to turn in the following information: ✓ Copy of the mortgage statement. ✓ Proof of any utilities she will be responsible. ✓ Proof of anyone helping pay the mortgage. ► Ask the caller for her new address and phone number (if this changed) and update ICES with this information. ► If the caller SOLD her home, tell the caller that she will need to turn the following information in: ✓ Proof of sale ✓ Copy of any excess resources she has from the sale of the home (i.e., money in a savings or checking account). ► Ask the caller for her new address and phone number (if this changed) and update ICES case notes with this information. ► Explain to the caller that the change will be processed, and we will mail her a Pending Notice to request all verification of the change reported.	Follow action steps.

Action	Script
The notice will include a due date and instructions where to mail or fax the requested documents or that the documents can be submitted at a local FSSA/DFR office/Help Center. ► Update the ICES case notes with all of the information the caller reported regarding the change. ► From within the case, select Tasks on the Left Navigation bar and create a “Reported Change” task for WG 3.	

2.13.11.16 I got a new/different car.

Action	Script
► **Handled by Tier 2 ES** ► After authenticating the caller, ask for the make, model, and year of the vehicle, what she paid for it, and what is still owed. Ask if she traded in a vehicle currently shown in the case. ► Tell the caller that she will need to mail/fax/submit at a local FSSA/DFR office/Help Center proof of the new vehicle (i.e., bill of sale, title, registration, etc.). ► If she traded in a vehicle that is currently in the case, then she needs to turn in proof of sale or proof that she no longer has the vehicle. ► Inform the caller that she will receive a notice in the mail from us requesting verification of the reported change. Explain that the she will need to make sure to submit via mail, fax, or in person at a FSSA/DFR office/Help Center copies of verification documents that are requested, along with the bar-coded Document Cover Sheet that will be enclosed with the notice. Remind her to write her name and	Follow action steps.

Action	Script
SSN or Case Number on copies of any documents submitted. ► Update ICES case notes with all of the information the Client reported regarding the change. ► From within the case, select Tasks on the Left Navigation bar and create a “Report of Change” task for WG 3.	

2.13.11.17 I changed banks.

Action	Script
► Handled by Tier 2 ES ► After authenticating caller, tell the caller that she will need to turn in the following information: ✓ A statement from the bank where she closed the former account. ✓ A copy of the current balance of all accounts at the new bank she is using. ► Inform the caller that she will receive a notice in the mail from us requesting verification of the reported change. ► Explain that the caller will need to make sure to submit via mail, fax, or in person at a local FSSA/DFR office/Help Center copies of verification documents that are requested, along with the bar-coded Document Cover Sheet that will be enclosed with the notice. Remind the caller to write name and SSN or Case Number on copies of any documents submitted. ► Update ICES case notes with the information the Client reported regarding the change. ► From within the case, select Tasks on the Left Navigation bar and create a “Report of Change” task for WG 3.	Follow action steps.

2.13.11.18 My teenager will be working two jobs this summer. Will this income reduce my benefits?

Action	Script
► **Handled by PRT (Problem Resolution Team)** ► Follow script.	As long as your child was in school for the last school year and is going to be enrolled in school for the following school year and is just off during the summer for the school mandated summer vacation, then the income will not count. Once your child is over 17 years old, then there can be a change in benefits due to the child's income.

2.13.11.19 My family has started receiving health insurance through my employer (Or) My family no longer has insurance coverage through my employer.

Action	Script
► **Handled by PRT (Problem Resolution Team)** ► Authenticate the caller so you can retrieve case information. ► If the caller reports that she has STARTED receiving other medical coverage, let the caller know she needs to submit a copy of the front and back of the new insurance card and any information on coverage she has. ► Ask the caller for the new insurance information: ✓ Name of insurance she is covered by. ✓ Who is covered on the policy? ✓ What the effective date is of the policy? ✓ Who the policy holder is. ► If the caller reports that she has STOPPED receiving other medical coverage then let the caller know she needs to turn in proof of when the coverage ended or will end.	Follow action steps.

Action	Script
► Ask the caller for the following information: ✓ Name of the insurance she is covered by. ✓ Who is no longer covered by the policy. ✓ What the last date of coverage is. ✓ Who the policy holder was. ► Inform the caller that she will receive a notice in the mail requesting verification of the reported changes. ► Explain that the caller must submit via mail, fax, or in person at a local FSSA/DFR office/Help Center copies of verification documents that are requested, along with the bar-coded Document Cover Sheet that will be enclosed with the notice. ► Remind caller to write name and SSN or Case Number on copies of any documents submitted. ► Update ICES case notes with all of the information the Client reported regarding the change. ► From within the case, select Tasks on the Left Navigation bar and create a Reported Change task for WG3. ► If any family members now receiving employer sponsored health insurance also have a HIP case, from within the HIP case select Tasks on the Left Navigation bar and create a "Reported Change" task which is sent to HIP WG3 for processing.	

2.13.12 EBT

2.13.12.1 How do I get an EBT card?

Action	Script
► Follow script. ► Authenticate caller and determine case status.	Households who apply and are eligible for Food Stamps or Cash Assistance receive an EBT card, also called a Hoosier Works card, to access their benefits electronically. It works like a debit card, with a specific benefit amount authorized each month. Benefits are secure because the card only works with a four digit Personal Identification Number selected by the participant.

2.13.12.2 My EBT/Hoosier Works card does not work.

Action	Script
► Follow script.	You need to call the Customer Service Automated Response Unit at 1-877-768-5098 to report it and request a replacement. If you need to select a new PIN, follow the instructions given by the Customer Service Automated Response or go to the FSSA/DFR office/Help Center nearest you.

2.13.12.3 My EBT/Hoosier Works card was lost/stolen. How do I get another one?

Action	Script
► Follow script. ► (Since general question is being asked, general information in the script may be provided. Authentication is required for any case specific information.)	You need to call the Customer Service Automated Response Unit at 1-877-768-5098 to report it and request a replacement. You will be charged a $2 fee for the replacement of your card. This fee is subtracted from the Food Stamp balance on your card.

2.13.12.4 Where can I use my EBT/Hoosier works card?

Action	Script
► Follow script.	If you receive Food Stamps, you can access your benefits at any store, supermarket or co-op

Action	Script
	approved by the U.S. Department of Agriculture to accept the Hoosier Works card. You may want to contact the store nearest you to be sure before you go shopping. If you receive TANF cash assistance, you can access your benefits at authorized retailers and banks.

2.13.12.5 How do I know the account balance on my EBT/Hoosier Works card?

Action	Script
► Follow script.	The easiest way to keep track of your balance is to keep your receipts. Your balance appears on purchase receipts and on point of sale machines at authorized retailers. You can also get your balance by calling the Customer Service Automated Response Unit at 1-877-768-5098. If you have access to the internet, you can also check your balance on-line at: www.ebtaccount.jpmorgan.com <insert hyperlink>.

2.13.12.6 I just received my EBT/Hoosier Works card in the mail. What do I do now?

Action	Script
► Follow script. ► (Since general question is being asked, general information in the script may be provided. Authentication is required for any case specific information.)	Call 1-877-768-5098 and follow the instructions to activate your card. When you call you will select a Personal Identification Number (PIN) that you use when purchasing food with your card. The toll free phone number is also listed on the back of your Hoosier Works Card. You may also visit the FSSA/DFR office/Help Center closest to you to have the card activated.

2.13.12.7 When are EBT benefits available?

Action	Script
► Follow script. ► (Since general question is being asked, general information in the	Food Stamp benefits are available on one of the first 10 days of each month depending on the first letter of your last name. This schedule is the same

Action	Script
script may be provided. Authentication is required for any case specific information.) ► Food Stamp Issuance Schedule (based on first letter of client's last name): - A, B 1st - C, D 2nd - E,F,G 3rd - H, I 4th - J,K,L 5th - M,N 6th - O, P, Q, R 7th - S 8th - T,U,V 9th - W,X,Y,Z 10th ► TANF (cash) benefits are issued on the first day of each month.	each month. (If client is calling about Food Stamps) Your benefits are available on the ( ) of the month. This schedule is the same each month. (If client is calling about TANF (cash)) Your benefits are available on the first day of each month.

2.13.12.8 How do I get a vault card for EBT?

Action	Script
Authenticate caller. If caller is authenticated, review Assistance Group(s) approved to determine if caller is approved for Food Stamps. Look at ICES (enter AEWAA in TRAN and the case number/current date in PARMS) and view AEWAA history to determine what code was used when Food Stamps were approved (041 or 043 for expedited). If caller was approved for expedited Food Stamps, inform her that she needs to return to the local office and request a vault card there. If caller was not approved for expedited Food Stamps, inform caller that when Food Stamps are approved, an EBT card is sent through the mail to them and instructions are included on how to activate the card. Provide EBT number for further questions (1-877-768-5098).	Follow action steps.

2.13.12.9 My PIN does not work (or caller has any other PIN problem)

Action	Script
Authenticate caller. Explain to caller that she will need to contact the EBT number at 1-877-768-5098. Tell the caller not to enter the card number when the IVR (interactive voice response) system requests it so that the caller can be routed to speak with someone for assistance.	Follow action steps.

2.13.13 Complaints and Appeals

2.13.13.1 I want to file a complaint.

Action	Script
► Determine if you are able to authenticate the caller.	Thank you for reporting this to us. May I have your name and DOB or Case Number?
► Caller cannot be authenticated, and complaint is regarding a specific case or Client: ✓ Gather as much information as possible, including name and telephone number of complainant (unless anonymous), and create a task for WG 6 to research further. Document in ICES case notes. ► Caller cannot be authenticated, and cannot provide sufficient information to identify a specific case or Client. ✓ Continue to gather information about the nature of the complaint, including name and telephone number of complainant (unless anonymous), and enter it in Notepad (from the desktop) so that you can create a user generated task for WG 6 to	Follow action steps.

Action	Script
process. ► Caller is authenticated: ✓ After authenticating caller, listen to and document the nature of the complaint in as much detail as possible. ✓ Attempt to resolve the complaint by providing information. Typically complaints can be resolved by listening and responding to the Client's questions regarding their application or case status or benefits. ✓ If necessary, briefly research the case by using appropriate screens in ICES or checking CLRC in ICES using current date in PARMS. ✓ If complaint is resolved, document the resolution in ICES case notes. ► If complaint is not resolved or requires more detailed research than can be completed during the call, create a task for WG 6 for further research and response. ► Enter the caller's name, address, telephone number, and complaint details in ICES case notes. ► If complaint cannot be resolved during call and caller insists on speaking with a supervisor, **escalate call to a Team Coach**. ► If the caller's complaint cannot be resolved during the call, create a user generated task for the Complaints WG (6), and inform caller that their information will be **escalated to the Complaints unit** for further research.	

2.13.13.2 My application was denied, and I think I'm eligible. (Or) I don't agree with the decision made on my application/case.

Action	Script
► Transfer to PRT (Problem Resolution Team) ► Authenticate caller. ► Check Case Home page and AG status to confirm denial. Also review notice for denial reason. ► Follow script, consistent with the AG being appealed. ► If the Client states he/she would like a fair hearing (and it is for Food Stamps), then initiate the Request for Fair Hearing and send to WG 7.	If you disagree with the decision, you may request a fair hearing. If the disagreement involves Food Stamps I can take your request verbally over the phone; however, if it is for TANF or Medicaid, you will need to submit that request in writing. You can mail the request to: FSSA Document Center P.O. Box 1810 Marion, IN 46952 You may also fax it to 1-800-403-0864. Please be sure to include a telephone number where you can be reached. On the letter notifying you about your eligibility being denied, there is an explanation of how to appeal if you disagree with the decision. Please review that information so that you understand the hearing process. After your request is submitted, a hearing date and time will be scheduled for you with a hearings officer. A representative from the office that processed your case will be present. You may represent yourself or authorize someone else such as an attorney, a relative or a friend to represent you. You can bring a witness with you if you feel it is necessary along with any additional information you feel would be useful to the officer making the decision. After the hearing, the officer will review all information, and you will receive a notice in the mail informing you of the hearing officer's decision. For Food Stamps only: If you would like to request a fair hearing I will send a request to our Hearings department to get this process started for you.

2.13.13.3 I was discriminated against and want to file a complaint.

Action	Script
► **Transfer to PRT**	We appreciate your reporting this to us.

Action	Script
► Gather and enter the following information in Call Notes: ✓ Caller's name, address and phone number. ✓ Name and location of office where the alleged discrimination took place. ✓ The nature of the incident that led to the complaint. ✓ The date of the alleged incident. ► Explain that the complaint will be submitted for investigation to the State. ► If you have a case number, from within the case select Tasks from the Left Navigation bar and create task for Complaints WG 6. ► If caller asks for a telephone number of the State to follow up, determine what region caller is in and provide Regional Manager name and telephone number (in Robohelp).	We are prohibited by law from discriminating against anyone on the basis of race, color, national origin, sex, age, disability, religion, or political beliefs. I will need to get some information from you so that your complaint can be investigated by the Family and Social Services Administration. Follow action steps.

2.13.14 Fraud

2.13.14.1 I want to report fraud.

Action	Script
► **Handled by PRT** ► Ask for caller's identifying information (if they are willing to provide it; otherwise document that they asked to remain anonymous). ► Ask for as much information as possible (see script) regarding the potentially fraudulent situation, such as person's (or provider or retailer if appropriate) name, address, phone number, Case Number and a detailed account of the suspected fraudulent activity. ► Document all information provided by the caller in ICES CLRC case notes, so that it can be investigated further. ► Create a Suspected Fraud Referral task (user generated) for WG 10 to investigate.	We appreciate your reporting this situation to us. We need as much information as you can provide so that we can look into it further. All information you give us is kept strictly confidential. 1. May I have your name? 2. Enter caller's telephone number in the Case Notes as shown in the agent's Case Details for Call Center screen; if a different contact number is provided at the end of the call, include that number as the contact number provided. 3. What is the situation that you suspect is fraudulent? 4. Name(s) of the person(s) involved. 5. Address(es) of the person(s) involved. 6. Date(s) of birth, Case Numbers, or SSNs, if known of the person(s) involved. 7. License plate numbers if known. 8. Name(s), address(es), and telephone number of anyone else who may have more information about this situation. 9. When the situation began and how long it has been going on, or when it occurred. 10. Any other information to assist in the investigation. 11. If we need to contact you, what is a telephone number where we can reach you? Thank you very much for reporting this to us.

2.13.14.2 Can I report fraud without giving my name?

Action	Script
► **Handled by PRT** ► Follow script.	Anyone suspecting fraud should report it, and you can report without giving your name. We handle all reports with the strictest confidentiality. It's very important that you provide as much detail about the

Action	Script
	suspected fraud as you can to aid in an investigation.

2.13.14.3 What happens after I report this fraud situation?

Action	Script
► **Handled by PRT** ► Follow script.	We'll begin an investigation. It's very important that you provide as much information as you can to aid in the investigation.

2.13.15 General Questions

2.13.15.1 What are your hours?

Action	Script
► Follow script.	If you want to speak with an agent directly, you can contact us Monday through Friday from 7 a.m. to 7 p.m., except on holidays. If you call outside of our business hours, you can still access many of our self-service features.

2.13.15.2 Where is the closest Help Center and what are their hours?

Action	Script
► Follow script. ► Refer to the Office Locator in the OPS Tool for a list of offices by county. ► Attempt to determine if person is going to the FSSA/DFR office/Help Center for something you can assist with during the call	If you'll provide your county, I can give you that information. The office is open 8am-4:30pm, Monday through Friday, except holidays. Is there anything I may assist you with?

2.13.15.3 Calls from Media or Elected Officials

Action	Script
► **Media:** Refer callers identified as media to John Buscemi with IBM at 212-745-4080 (office), 516-987-1147 (cell), (or by email at jbuscemi@us.ibm.com) and Lauren Auld, FSSA Communications Director, at 317-232-4641 (or by email at Lauren.Auld@fssa.IN.gov.) ► **Elected Official:** If a caller identifies himself as an elected official or calling on behalf of an elected official about a specific case, gather the specific case information and create a user generated task for the Complaints queue, handled by Workgroup 6.	Follow action steps.

2.13.15.4 I need information on other community services.

Action	Script
► Navigate to Community Resources link on portal. ► Ask about type of resource caller is seeking and attempt to locate it in the links provided. Also provide the portal link to the caller. ► Instruct caller to contact 2-1-1 or local United Way if resource sought is not listed.	Follow action steps.

2.13.15.5 I have questions about Medicare Part D.

Action	Script
► Follow script.	All Medicare Part D questions should be directed to the Social Security Administration. You can call for help 24 hours a day, 7 days a week at 1-800-MEDICARE (1-800-633-4227; TTY 1-877-486-2048) or you can visit them online at http://www.medicare.gov <insert hyperlink>.

2.13.15.6 I have an application/documents/information to send you. Where do I send it?

Action	Script
► Follow script.	You need to mail your application to: FSSA Document Center PO Box 1810 Marion, IN 46952 or fax it to: 1-800-403-0864. If you received a bar coded cover sheet with a notice we mailed to you, put it on top of the documents you're sending. If you didn't receive a bar coded cover sheet or you no longer have it, be sure to clearly print your name, Case Number, or Social Security Number on each piece of information you send. This will help us process your application faster.

2.13.16 Third Party Calls (such as Housing Authorities, Providers)

2.13.16.1 Calling to verify a person is receiving benefits.

Action	Script
► **Transfer to PRT** ► Ask for and document the caller's name, agency/company name and address, and phone number. ► Ask caller to provide the name and other identifying information (DOB, Case Number or SSN) of the person about whom they are inquiring. ► Do not provide any information about the case before locating a signed release of information. **Client data is authenticated**: 1. After authenticating Client, document the information requested in as much detail as possible. 2. Navigate to Documents in the case to determine if the Client has provided a signed release of information for this third party. If none is located, explain to the caller that you are unable to provide any information without a signed release of information from the person about whom they are calling. 3. If a signed release of information for this third party is located, provide the information requested and authorized in the release. 4. If necessary, research case by using appropriate screens in ICES or checking CLRC in ICES using current date in PARMS. 5. In ICES, document the information requested by and provided to caller. ► If the request requires more detailed	May I have your name, agency/company name and address, and a phone number from where you can be contacted? May I have the Client's name, DOB and the Case Number or their SSN? Follow action steps.

Action	Script
research than can be completed during the call, from within the case select Tasks from the Left Navigation bar and create a task for “Information Request from External Party,” which is sent to WG 3 for further research and response. Document the caller’s name, address, telephone number and request details and enter in ICES Case Notes pertaining to the task. If the caller’s request cannot be answered during the call, inform the caller that their request will be escalated for further research and that the caller can expect a return call.	

2.13.17 IMPACT

2.13.17.1 I need to go to job orientation, etc. Where do I go? What do I do? (All Other IMPACT Questions.)

Action	Script
► Agent instructs caller to press ‘1’ (for English/Spanish), then ‘3’ for Impact, then enter zip code to get connected to the correct Help Center to get answers to their questions and to schedule appointments. ► Agent enters a 4 digit code (5579) to transfer the caller to the IVR.	Let me transfer you to the IMPACT center in your area. When I transfer you, you will be asked to select your language. Press ‘1’ for English or ‘2’ for Spanish. Then press ‘3’ to be transferred to IMPACT. You will be asked to enter your zip code into your telephone keypad. When you do that, you will be transferred to the Help Center closest to you.

2.13.18 Out of State Inquiry

2.13.18.1 Call from another State seeking information on benefits received in Indiana.

Action	Script
► **Transfer to PRT** ► Ask for: ✓ Caller's name, state agency name and address, and phone number where caller can be reached. ✓ Identifying data of person about whom caller is seeking verification of benefits. (name, DOB, and SSN or Case Number). ✓ What program benefits other State is inquiring about. ► If record located, document in ICES Case Notes. If case is closed, document in Curam Call Notes. ► From within the case, select Tasks on the Left Navigation bar and create an Out of State Inquiry Request task for WG 1 to research and respond to the inquiry from the other state, calling the other state's point of contact back with the information requested. ► Include pertinent information about the call in the task notes, particularly if case is not located when performing a Search.	May I have your name, state and agency you are calling from and a phone number where you can be reached? May I have the Client's name, DOB and their SSN or Case Number? Follow action steps.

2.13.18.2 Call from another State in response to Coalition call about benefits received in the other state. (WG could have left message for point of contact to call us back.)

Action	Script
► **Transfer to PRT** ► Ask for the caller's name, state agency name, address, and phone number to be recorded in ICES	May I have your name, state agency name, address and your phone number? What was the message left that resulted in your calling us? If any Client information was left in the message, please provide it so that I can locate the

Action	Script
Case Notes. ► Review ICES Case Notes to determine reason Coalition made the original call. ► Possible reasons: ✓ What benefits were received? ✓ When benefits ended? ✓ If TANF received, for how many months? ✓ To determine if there are any outstanding benefit recoveries or Intentional Program Violations. ✓ Any other reason specified in case notes. ► Explain that the call was made on behalf of the Indiana Family and Social Services Administration regarding an applicant/recipient receiving benefits in <their state>. ► Ask person calling back to confirm the identifying information of the person we called the other State about by providing the Client's name, DOB and Case Number or SSN (this may have been provided in the outgoing voice message). ► If for some reason we did not provide that information in the message left, handle as per the script in Section 2.13.18.1, Call from another State seeking information on benefits received in Indiana <insert hyperlink>. **Client data is authenticated:** ► Gather information based on the reason for the original call, and create tasks for other workgroups, as appropriate. Document information received in ICES Case Notes. **Client data is not authenticated:** ► If the information provided by the caller from the other State does not match any information in our records, inform the caller that we	record and see why we called you. May I have the Client's name, DOB and the Case Number or SSN that was provided in the voice message? ✓ Record is located: We called on behalf of the Indiana Family and Social Services Administration regarding (name of applicant/recipient) to verify receipt of benefits in your State. (Gather information needed based on Case Notes.) ✓ Record is not located: I don't find a match for this Client (or no information was provided in the message left with the other State). I apologize for the inconvenience. Thank you for calling us back. End call.

Action	Script
can not locate any Client/case with the information they provided and apologize for the inconvenience. Do not share any case information.	

2.13.19 Call-back From a Client

Action	Script
► Explain that the call was made to the household on behalf of the Indiana Family and Social Services Administration. ► Ask for caller's name, DOB and Case Number or SSN. Do not share any information about a case with anyone other than the Client or the Client's authorized representative. **Caller is authenticated**: ► Review case notes (in WFMS and ICES) to determine reason for call. Notify your Team Lead or Transfer to PRT if necessary. Possible reasons for the call: • Data gathering. • Potentially expedited food stamp application. • Follow up on potentially invalid application (to get address or programs selected). • Other reasons, as specified in case notes. ► Follow up on the original reason for call, gathering and providing information as per the appropriate scripts and procedures, and creating tasks for other workgroups, if appropriate. **Caller is not authenticated**: ► If a person search does not provide information to identify the caller, inform the caller that if she or anyone in her household did not have any pending business with the Indiana Family and Social Services Administration, that we must have called an incorrect number, and apologize for the inconvenience. Do not share any case information.	Let me check our records to find the reason your number was called. May I have your name and date of birth? (Search to authenticate caller.) ✓ Caller found: Follow action steps. ✓ Caller not found: Are you receiving any type of assistance from the Indiana Family and Social Services Administration? If so, what is your Case Number or SSN?) ✓ Still unable to locate: That information does not match our records. You or someone in your household provided your telephone number as a contact number. If no one has applied or is currently receiving assistance, we may have just called a wrong number. I apologize for the inconvenience.

2.13.20 Any Question to Which You Do Not Know the Answer

Action	Script
► Tier 1 will **escalate first to Tier 1 Team Coach, then if unavailable to Team Lead, then to PRT**. ► Speak with Coach or Lead to confirm correct response or whether call needs to be escalated. Provide appropriate response to caller. ► When PRT does not know the answer to a question, explain that the question will be forwarded for further research. From within the WFMS case, create a Call Center Coaches task for the Service Center notification queue. (These tasks are reviewed daily by the Quality Department and team leads to address.)	May I place you on hold while I do further research on this question?

2.13.21 State Funded Program Calls (How to Apply)

Action	Script
► Follow script. ► If caller wants to be screened for Hoosier Healthwise or Medicaid, follow Screening Script in Section 2.13.1.1, Can you tell me if I might be eligible for benefits without having to complete an entire application? <insert hyperlink>.	**CSHCS** To apply for CSHCS (Children with Special Health Care Services), contact Riley Hospital at www.rileyhospital.org <insert hyperlink> or toll free number 1-800-248-1199 or your local First Steps Office at www.in.gov/fssa/first <insert hyperlink> or toll free number 1-800-441-7837. You should also apply for Hoosier Healthwise, and if you would like to answer a few questions, I can tell you if you might be eligible or you can screen or apply on-line at www.in.gov/fssa and click Apply for Benefits. Burial Assistance (applications sent in by funeral homes and cemeteries) For Burial Assistance, mail the application to FSSA Document Center P.O. Box 1810 Marion Indiana 46952 Or fax it to 1-800-403-0864. ARCH or RBA For ARCH (Assistance to Residents in County Homes) or RBA (Room and Board Assistance), you would need to complete an application for Medicaid. If you would like to answer a few questions, I can tell you if you might be eligible for Medicaid. Once eligibility has been determined, you (or the person for whom you are applying) would apply for ARCH or RBA through the facility.

2.13.22 This section has been redacted

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2.13.23 I need some information about HIP (Healthy Indiana Plan)

Action	Script
► Follow script. (Note: this is an interim script only.) ► Effective 12-21-07, transfer the call back to the IVR, using the transfer extension of 5579 so that the caller can speak with a HIP call center representative. Instruct the caller to select the language then at the next prompt, to select 1 for the Healthy Indiana Plan.	For information about the HIP program, please call 1-877-GET HIP9. (Effective 12-21-07) I'm going to transfer you to a Healthy Indiana Plan representative. When I transfer you, you'll hear a message to select your language and after that, you will hear a message that says "for the Healthy Indiana Plan, press 1." Press 1 and you will be connected with a HIP representative. Please hold while I transfer you.

2.13.24 Overpayment Claims and Taxes

2.13.24.1 What is this claim about?

Action	Script
Handled by PRT. • Authenticate the caller. • Ask the caller to describe the notice she is asking about to confirm whether it is an overpayment notice. • Refer to the instructions below to perform any research needed to explain the information in the notice to the client. • ICES generates a letter when the claim is opened. It is called the 'BV01' and says in big letters across the top, "NOTICE OF OVERPAYMENT AND DEMAND FOR REPAYMENT". A repayment agreement (pre-filled) is sent with the BV01 for the client to sign and return with their first payment. The client has 30 days to appeal a TANF claim *in writing.* The client has 90 days to appeal a FS claim, either in writing or orally (even over the phone). • If the client has the claim number (case/cat/seq/claim seq), go to Tran: BVBR, Parms: case/cat/seq/claim number. If the client does not have the claim number, go to BVIC for	Follow action steps.

Action	Script
their SSN to get it. • BVBR shows the time period, the amount, reasons, whether it is agency or inadvertent error or IPV – Intentional Program Violation (fraud). One other category, for FS only, is PPV (*probable* program violation), meaning we *think* it will be IPV but it has not yet been adjudicated. PPV is treated as an inadvertent error until it is adjudicated. • Hit PF2 in order to see all comments on the claim. Hit PF15 to get back to BVBR. • Enter notes summarizing the call in ICES CLRC.	

2.13.24.2 What do I owe?

Action	Script
Handled by PRT. • Authenticate the caller. Refer to the instructions below to research and respond to the caller's questions. • Go to BVIC for the person's SSN. That will show all claims for which the client is liable, the claim status, claim amount and open amount. BVIC shows both open and closed claims. Open claims are statuses OA, OP, PR, SU. • Tell the debtor about all 'OPEN AMOUNTS'. • If there is one TANF and one FS claim, payments will need to be made on *both* to avoid further action. • If there is more than one open claim for one category (FS or TANF), then explain that all payments for FS (for instance) will go to pay off the oldest FS claim first, then the second oldest, etc. While that FS claim is being repaid at the approved rate, there will be no collection efforts on other FS claims. The same applies for TANF. • In order to avoid intercepts, payments must be 3% or $50 of the original balance, whichever is the greater amount, and must be made EVERY MONTH unless the debtor again becomes a recipient for that benefit. As soon as the first allotment reduction occurs, no other payments are required as long as the recoupment continues. When the client is off benefits, then	Follow action steps.

money order or check payments need to resume. • All repayments are to be made to: FSSA Claim Repayment PO Box 1007 Indianapolis IN 46262-1007 • Checks and Money Orders should be made out to ‘State of Indiana’. Do NOT send cash. • Any amount will be accepted, but only the approved amount (or more) will prevent an intercept. • Enter notes summarizing the call in ICES CLRC.	

2.13.24.3That (claim) should be paid off by now.

Action	Script
Handled by PRT. • Authenticate the caller. • Offer to send copies of all payments made on the claim. Follow Send Notice work instructions <hyperlink to 3.11.4 > to print all BVTH screens for the claim to a blank template and mail to the debtor. If the debtor made a payment not listed, the debtor needs to contact Revenue Recovery in Financial Management in order to have the missing payments added. They will need to send a copy of the contested receipt.	Follow action steps.

2.13.24.4I got a letter saying they are going to take my tax check.

Action	Script
Handled by PRT. • Authenticate the caller and ask the caller what the letter says. Based on the information provided, review and provide the appropriate information for the type of intercept, based on the instructions below. • At the conclusion of the call, summarize in ICES CLRC. • When claims are 180 days delinquent, they are sent to Financial Management to process for	Follow action steps.

any involuntary ways to get repayments. • Financial Management (FM) sends out two different letters; one gives the debtor 60 days to respond and one gives the debtor 30 days to respond. That is the easy way to tell the difference. • Federal tax intercepts are for FS debts only. FM sends only *one* letter, giving the debtor 60 days to start making the appropriate payments. Debtors cannot appeal but can ask for a review. There are no further warnings before a Treasury offset by the TOP program. There is a $17 fee charged by the Federal government for processing each intercept (for a Social Security garnishment; they will charge it EVERY MONTH). TOP intercepts show on ICES as "DP;" however, the intercept may not show on ICES for four or more weeks. • Indiana Dept. of Revenue (IDOR) tax intercepts can be on either TANF or FS (priority is TANF). IDOR notifies FM that the client is entitled to a refund, then FM sends a letter to the debtor that gives them 30 days to respond. They may appeal, but it will not stop the intercept (FM will refund it if the agency loses the appeal). Every time the debtor is entitled to a state refund, FM will send another letter. Intercepts from IDOR show on ICES as "TI" payments.	

2.13.24.5 If I make a payment, will I get my tax check?

Action	**Script**
Handled by PRT. • Authenticate the caller. Based on the information provided in the notice, the system, and by the caller, provide the appropriate response as shown below. ✓ Not if the tax intercept is already in process ✓ Not if the debtor made payments last year at tax time and then stopped. The key word is *expectation.* What can we *expect* to happen in the future from what has happened with this debtor in the past? • At the conclusion of the call, summarize in ICES CLRC.	Follow action steps.

2.13.24.6You took my (or my children's) money.

Action	Script
Handled by PRT. • Authenticate the caller. Use the information below to respond to the caller's question, which is usually about back child support from an absent parent. • Child Support (CS) has the right to intercept funds to repay TANF received because CS was ordered and not paid at the time. CS intercepts have priority over TANF and FS claim repayments. • Tell the client that they (or the A/P) can request an **U**nreimbursed **P**ast **P**ublic **A**ssistance report from their county prosecutor's CS division. The UPPA report takes about three weeks to receive. It shows all the TANF received and all payments made, including any repayments on TANF overpayment claims. With the report, the client can see how much is still owed, or CS can see that the TANF has actually all been repaid. • At the conclusion of the call, summarize in ICES CLRC.	Follow action steps.

2.13.24.7This was discharged by bankruptcy.

Actions	Script
Handled by PRT. • Authenticate the caller. • We must verify a bankruptcy. If the caller states they have filed for bankruptcy, ask the caller to mail in a copy of the papers to the FSSA Document Center. Instruct caller to write their case number and Attention: Benefit Recovery on the papers. • At the conclusion of the call, summarize in ICES CLRC.	Follow action steps.

2.13.25 PERM (Payment Error Rate Measurement) Calls

Background information: The Payment Error Rate Measurement, known as PERM, is a federally mandated audit of Medicaid and SCHIP eligibility cases. PERM was developed by the Centers for Medicare and Medicaid Services (CMS) to satisfy the requirements of the Improper Payments Information Act of 2002. Each state must participate in PERM eligibility reviews every three years. Approximately 1400 cases, both open cases and denial and closure actions, will be reviewed for correctness under PERM regulations for Federal Fiscal Year 2008. All reviews are subject to CMS audit after all review results have been reported to CMS.

The Office of Medicaid Planning and Policy (OMPP) has contracted with Myers and Stauffer, a certified public accounting firm, to complete the PERM reviews. A PERM review is a desk review of the file unless the case does not contain the information needed to support the worker's eligibility determination, or if the last redetermination action is more than 12 months prior to the review date. The old paper files, the ICES eligibility system, and WFMS will be accessed to complete the reviews.

During the course of the reviews, Myers and Stauffer PERM reviewers will be contacting clients to obtain missing information, and to clarify inconsistent case file information. If a call is received from a client regarding these reviews, inform the client to cooperate with the Myers and Stauffer reviewers, and to send in the requested verification. The cover letter that goes with the verification requests explains the reviews, and lists a telephone number for Catherine Snider of OMPP. Clients are welcome to call Ms. Snider at 1-877-436-0411 with any questions regarding Myers and Stauffer's authority to conduct the PERM reviews.

2.13.25.1 What is PERM?

Actions	Script
Provide script response.	PERM (Payment Error Rate Measurement) is a federally mandated review of your Medicaid or Hoosier Healthwise eligibility. Clients are randomly selected for this review. Myers and Stauffer is conducting the reviews for the State of Indiana.

2.13.25.2 Who is Myers and Stauffer?

Actions	Script
Provide script response.	Myers and Stauffer is a certified public accounting firm that is completing PERM reviews for the State of Indiana. They are a reputable company that has 13 offices nationwide, and they have been in business for 30 years.

2.13.25.3 If I send personal information, such as copies of Social Security cards, birth certificates, pay stubs, and insurance cards to Myers and Stauffer, will my privacy be protected?

Actions	Script
Provide script response.	All information sent to Myers and Stauffer is handled in a HIPAA compliant manner designed to protect client confidentiality. All mail is opened by the PERM support staff, and is delivered promptly to the reviewer who requested the information. The information is stored in individual case files in a locked filing cabinet. Your information is never shared with anyone other than State of Indiana employees of the Family and Social Services Administration.